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The
FOOD MARKETING INDUSTRY SPEAKS
1984

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The Food Marketing Institute (FMI) is a non-profit association that conducts programs in research, education and public affairs on behalf of its 1,300 members—food retailers and wholesalers and their customers in the United States and overseas. FMI's domestic member companies operate over 17,000 retail food stores with a combined annual sales volume of $130 billion—half of all grocery sales in the United States. More than three-fourths of FMI's membership is comprised of independent supermarket operators or small regional firms. Its international membership includes more than 100 members from 40 nations.

The
FOOD
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The United States economy continued its vigorous recovery in 1983. Many factors contributed to this positive outlook. It was the third straight year of substantially reduced inflation; the Consumer Price Index rose by only 3.2 percent, the lowest 12-month increase since 1964. While inflation declined, the Gross National Product rose 3.3 percent. But probably the best news was the decline in unemployment. The year's decrease of 2.2 percentage points in unemployment meant that more than four million Americans went back to work between January and December of 1983.

Economic factors have also had a positive affect on the supermarket industry. Although retail and wholesale sales increases showed a continuation of their downward trend, after being adjusted for inflation, the 1983 figures showed increases in both retail and wholesale sales. In addition, the gross profit margin for both companies with warehouses and companies without warehouses rose again in 1983.

This report examines all the interdependent parts of our industry that work together to put food on the dinner tables of America: the food producer, the manufacturer, the wholesaler, and the retailer. It begins with a review of the economy in general with an in-depth look at those aspects which affect our industry directly. It covers sales and profit trends, and provides a detailed look at several special interest areas.

Highlighted this year, for example are distribution centers—both wholesale and retail, for dry grocery and refrigerated foods centers. The report also examines in detail the produce department, electronic funds transfer, medical benefit programs, and productivity by store type.

Much of the data are compiled through FMI's annual surveys of the industry. FMI gratefully acknowledges all those companies who gave their time and effort to fill out the questionnaires. A detailed explanation of the study is provided in the appendix.

Industry information is also drawn from other FMI research reports such as *Operations Review* and *Facts About Store Development*. The Institute would also like to acknowledge data gathered from *Forbes Magazine*, the U.S. Departments of Agriculture and Commerce, and many other business and government publications.

While this report contains the complete analysis for 1983, it does not include the cross tabulations of survey data from which this analysis was developed. This information, providing a more thorough look at industry activity, is contained in a separate, supplemental report entitled *Detailed Tabulations from the Food Marketing Industry Speaks, 1984*. Another publication, *Trends—Consumer Attitudes and the Supermarket, 1984*, parallels *Speaks* by presenting the state of the industry from the consumer side. *Trends* explores consumer attitudes toward the economy and the supermarket, and analyzes changes in consumer concerns and shopping patterns.

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IN 1983

Retail Sales Gain Over Previous Year	7.6%
Wholesale Sales Gain Over Previous Year	4.1%
Weekly Sales Per Square Foot	$6.90
Sale Per Customer Transaction	$14.60
Sales Per Labor Hour	$91.00
Gross Margin With Warehouse	23.7%
Gross Margin Without Warehouse	21.5%
Net Profit (before taxes)	1.3%
Weekly Store Sales	$153,600

These operating results are typical of FMI's member supermarkets. They represent average performance based on data from a cross-section of our membership.

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The ECONOMIC SETTING

Economic Growth

The Food Distribution industry, like every other industry, functions in the broad context of the nationwide economic environment. To fully understand this industry, one must view it in the context of trends in American life.

In 1983, the U.S. economy recovered vigorously. In fact, 1983 was so good that in 10, 20 or 30 years from now when people reminisce about the "Good Ole Days," they may well be talking about 1983.

1983 was the third straight year of substantially reduced inflation. The economy experienced double-digit inflation in 1980 and 1981, but only six percent in '82; and then less than four percent in 1983. During 1983, consumer prices rose by only 3.2 percent and producer prices by 0.6 percent. To put this in perspective, this rise in consumer prices was the smallest since 1972. For producer prices, it was the lowest 12-month increase since 1964. While inflation declined, the Gross National Product (GNP) rose 3.3 percent. In terms of real dollars, this represents a growth of almost $50 billion over the 1982 level.

Perhaps the best news on the economic front lies in the area of unemployment. Our highest monthly unemployment rate in 1983 was 10.4 percent of the civilian workforce. This figure is down from the high of 10.7 percent in 1982.

However, because most unemployment is of relatively short duration, unemployment touched a much larger number of our households than this percentage would indicate. In fact, at sometime during the calendar year 1982, almost 25 percent of all households had at least one wage earner unemployed.

The steady monthly decline in unemployment from January to December 1983 shows that the trend is reversing. The year's decrease of 2.2 percentage points in unemployment means that more than four million Americans have gone back to work since January.

In addition to these gains in employment and declines in inflation, both productivity and real wages rose, continuing an advance that began in 1982.

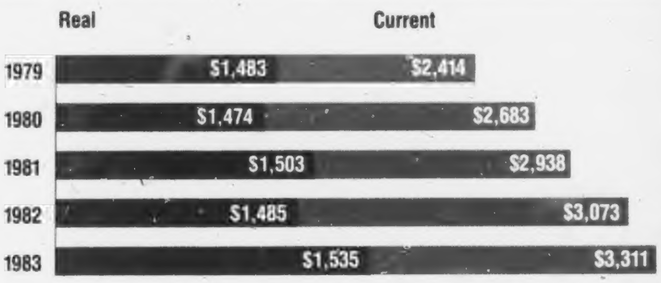
The major stock markets rose through the first half of the year then leveled off while the U.S. dollar appreciated in the foreign exchange markets, continuing a trend that began in late 1980. One result of the strong dollar is a higher price abroad for U.S. exports. This creates a lower demand for U.S. products and has weakened the U.S. economy for the last three years.

Even with a growing balance of payments deficit, the domestic economy has been very good news for both homebuilders and home buyers. In 1983, housing starts were in the neighborhood of 1.7 million and sales of single-family homes increased by about 52 percent over 1982 levels. The housing industry also benefited from a year of relatively low and stable interest rates. Perhaps the key word is stable. Although 1983 rates were low compared to the recent past, they were still high by historical standards. However, the fact that rates were less volatile than in recent years helped restore confidence to financial markets, to investors, and to consumers. Consumers have adjusted to these higher rates faster than economists believed they could.

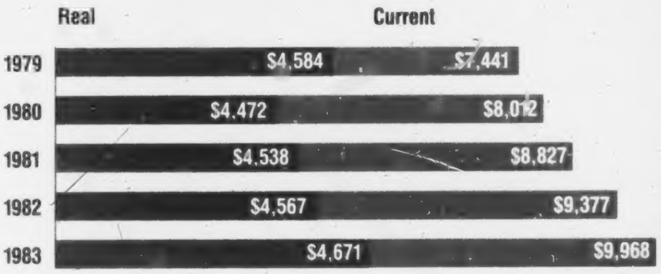
The economy has remained strong right through the first quarter of 1984 prompting fears of a new surge in inflation. An unusual pattern of recovery may mean that the old rules may not apply.

Not since the year 1940 has the U.S. entered the second year of a recovery with over eight percent

Gross National Product (Billions)



Per Capita Disposable Income



unemployment and under 80 percent of our manufacturing capacity utilized. Because of this, wage increases are likely to remain moderate and production bottlenecks few and far between. Barring any unforseen supply shocks, a major renewal of accelerating inflation may not occur this year.

What does this mean to consumers? The real meaning can be stated quite simply: more consumers had more money in their pockets than in any year in recent history. This shows up best in per capita disposable income. In terms of current dollars, the average American now has almost $600 more in disposable income than in 1982.

Although FMI does not collect data on restaurant sales, the Department of Commerce does. By examining restaurant sales an even greater insight is gained into the effects of economic growth on consumers.

Restaurant sales increases were high during the first part of 1983, but slacked off toward the end of the year. The two year trend shows that restaurant sales, in essence, peaked in late 1982 and early 1983. When people begin to feel the budget squeeze, one of their first reactions is to eat away from home less; when they see things improving, they begin to eat out a little more.

Food Production

The 1983 drought and acreage reductions reduced stocks and boosted prices of grains and other crops. Additionally, the outbreak of the avian flu among chickens and turkeys in the east and in California has meant that many, many flocks have been destroyed and that several areas have been quarantined. The flu's greatest impact, however, has been on egg production.

Grain producers recognized the Department of Agriculture's Payment-In-Kind (PIK) program as one of the most generous income transfer programs they had been offered in the 50-year history of federal farm programs. Farmers signed up in large numbers and as a result, participation in acreage reduction programs increased significantly in 1983. Then complications set in. Record acreage reductions occurred precisely in the same year as cold weather, floods, and droughts of historic proportions. All of this had a tremendous impact on crop production—particularly on the grain crops.

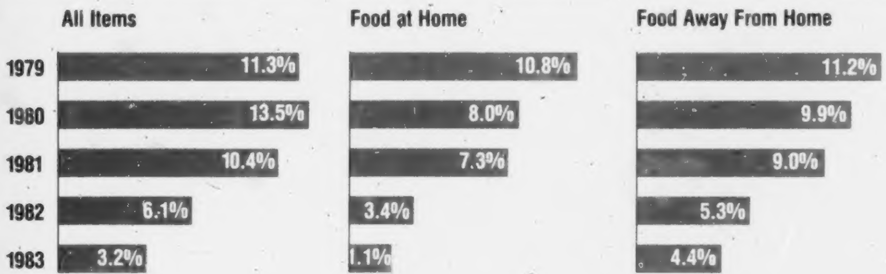
For example, corn production was at its lowest level in five years—almost half of what it was in 1982. This is reflected not only in the number of acres planted, but also in the number of acres harvested and in bushels per acre. Consequently, the price per bushel increased roughly 20 percent.

The same held true for wheat production which decreased by 387 million bushels from 1982 levels. Production of fresh fruit and fresh vegetables also declined, but this was due more to the weather conditions than to acreage reduction programs. The bitter cold experienced by most sections of the country around Christmas damaged citrus crops from Texas to Florida and even damaged the trees themselves. Some winter vegetable acreage was totally destroyed.

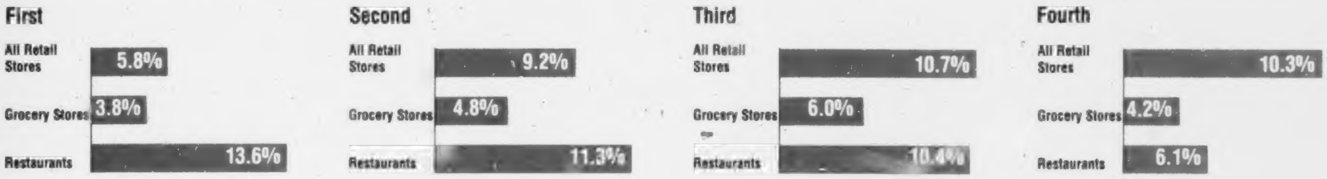
On the other side of the coin, beef, pork, and milk production all increased over their 1982 levels as did poultry. However, poultry production had been affected recently by the outbreak of the avian flu.

The loss of fruit and vegetable crops which resulted from December's cold spell were expected to be partially offset by increased imports. For example, Brazil exported frozen concentrated orange juice to help alleviate the 17 percent drop in U.S. citrus production and in late 1983 Mexico shipped extra vegetables.

Consumer Price Index



Sales Increase Over '82 By Quarters



Wholesaling

Sales increases for food wholesalers averaged 4.1 percent in 1983 down from six percent in 1982. The interesting aspect of this, however, is that after adjustments for inflation, real sales increases were up over 1982 to three percent. This represents a prime example of the positive effect declining inflation has had on the food distribution industry. Additionally, the average sales for a retail store served by a wholesaler increased to $2.18 million in 1983.

Of the numerous and varied services wholesalers provided to their membership in 1983, more than 90 percent offered handling of private label stock and individual retail pricing. More than 80 percent provided product movement data, handling of generic labels, advertising, equipment procurement, and gross margin reports by item.

Retailing

On the retail side, 1983 sales increased 7.6 percent, continuing a five year trend in declining sales increases. As with wholesale increases, however, real sales increases for retailers were up, rising to 6.4 percent after being adjusted for inflation. The past two years are good examples of the benefits from controlling inflation.

This very favorable increase as compared to the recent past reflects two forces at work. First, over the early 1980s inflation was so high that virtually all of the yearly sales gains disappeared when we deflated the numbers. In 1983 inflation was brought under control. Second, in the late 1970s and early 1980s some very large companies in the industry were experiencing substantial problems. Many of these companies have now stabilized or actually accomplished a turnaround. Others have left the industry.

This impact is quite evident when identical store sales are compared to total store sales. Identical store sales in current dollars demonstrated the lowest annual increase in six years at 6.1 percent. But again, this increase, although appearing low, was greater than the inflation rate and resulted in real sales increases of 4.9 percent, the highest in six years.

Forbes Magazine's annual study of industry profitability will help put this into perspective. Stockholders' equity (net worth), which reflects the earning power of the stockholders' equity, decreased slightly from last year's 16.9 percent to 16.2 percent in 1983.

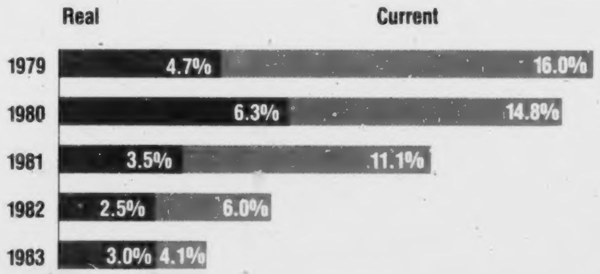
Forbes defines return on stockholders' equity as the percentage return on the stockholders' portion of a company's capital. Forbes calculates this by taking earnings per common share as a percentage of stockholders' equity per share at the start of the year. It is assumed that all convertible preferred stocks have been converted, which explains why this figure may be lower than others.

Return on total capital (total assets), which measures the ability of the industry's assets to generate profits, was also down slightly from last year's five-year high of 10.7 percent—registering this year at 10.5 percent, still higher than for any of the four years prior to 1982.

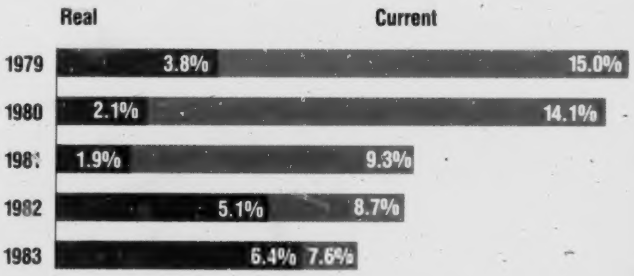
Return on total capital, calculated by *Forbes*, is the percentage return on a combination of stockholders' equity (both common and preferred) and long-term debt, including current maturities, minority stockholders' equity in consolidated subsidiaries, accumulated deferred taxes and investment tax credits. The profit figure for this calculation includes tax income, minority interest in net income and estimated after tax interest paid on long-term debt.

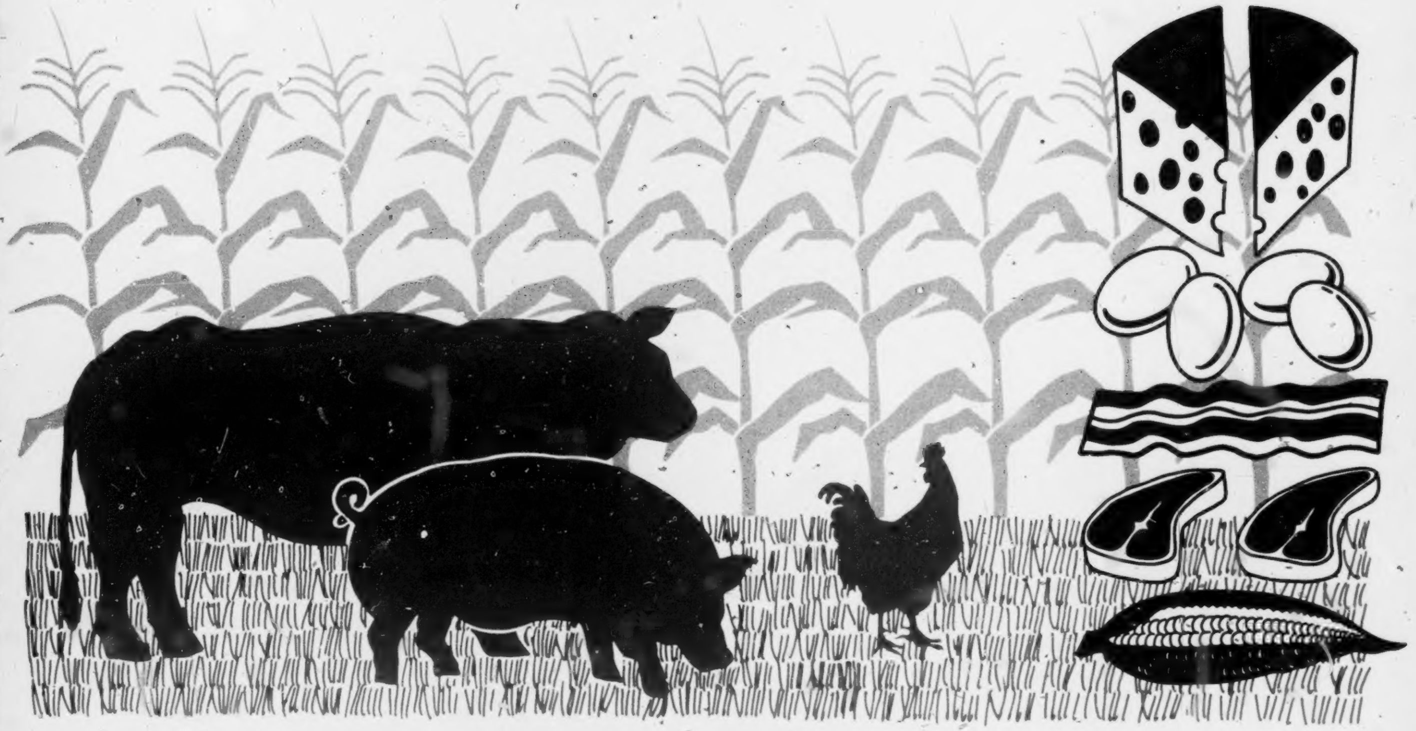
Membership Services Provided by Wholesalers	
Individual Retail Pricing	*96%*
Handle Private Label	*98%*
Advertising Programs	*88%*
Handle Generic Label	*90%*
Product Movement Data	*90%*
Equipment Procurement	*82%*
Gross Margin Report by Item	*82%*
Retail Accounting	*74%*
Member Payroll	*65%*
Real Estate & Store Engineering	*76%*
Education/Training	*69%*
Equipment & Fixture Financing	*57%*
Interior Decor & Design Service	*65%*
Scanning Support	*59%*
Discount Program	*65%*
Space Allocation	*49%*
Lease Financing	*53%*
DSD System	*55%*

Wholesale Sales Increase

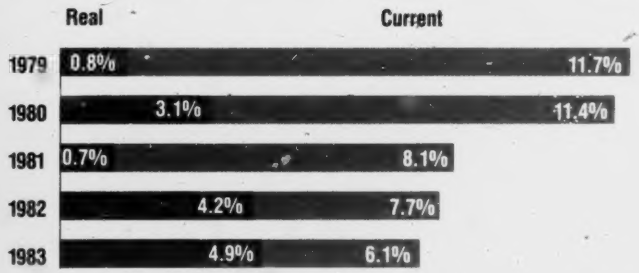


Retail Sales Increase

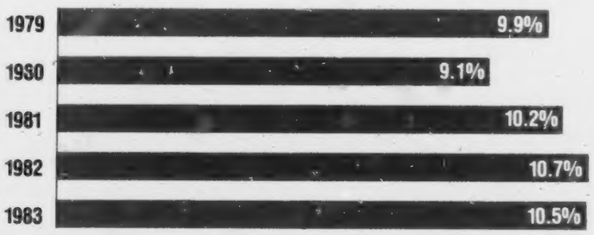




Identical Store Sales Increase

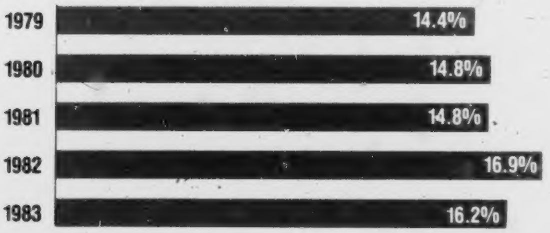


Return On Total Assets*



*Source *Forbes*

Return on Net Worth*



*Source *Forbes*

COMPANY PERFORMANCE

Gross Profit Margin

Gross profit margin represents total sales income minus the cost of goods sold. All expenses and profits come out of the gross profit margin. For companies without their own warehouse, the gross profit margin was 21.5 percent. Companies with their own warehouse saw a margin of 23.7 percent.

Store door margin, which represents gross margin minus warehouse and delivery costs, increased to 19.4 percent, slightly higher than the 1982 margin of 19.2 percent.

Net Profit Margin

Net profit margin, which is calculated by dividing net profits by net sales, decreased from 1.5 percent in 1982 to 1.3 percent in 1983. Quarterly net profits showed that the second and third quarters were the most profitable for 1983.

Productivity

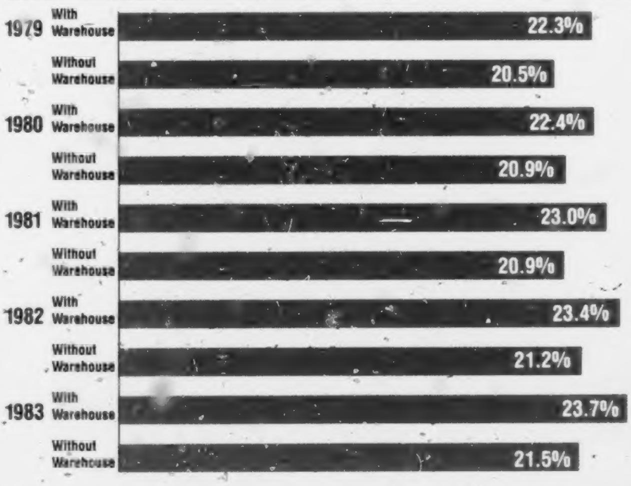
Another factor which helps determine profitability is productivity. FMI research found that in 1983 average weekly supermarket sales were $153,600. Combination stores recorded the highest average weekly sales at $291,230. They were followed by warehouse stores at $202,330 and super stores at $186,200. Conventional stores were the only type which recorded weekly sales less than the industry average. They averaged $100,000 per week.

Sale per customer transaction was $14.60 compared to $14.33 last year. In terms of real dollars, however, they were the lowest since 1980. Warehouse stores led in average sales per customer transaction with $22.15; followed by super stores and combination stores. Again, only conventional stores, with an average sale per customer transaction of $14.02, fell below the industry average.

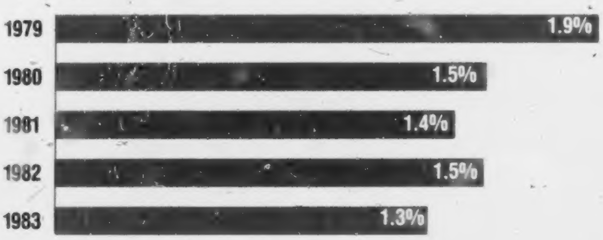
Sales per square foot of selling area decreased over last year, both in terms of current dollars—from $7.90 to $6.95—and in terms of real dollars—from $2.83 to $2.37. As would be expected, warehouse stores led in sales per square foot with $8.00, followed by conventional stores, combination stores, and super stores.

Sales per labor hour followed the trend of the last three years increasing slightly in current dollars, but decreasing in terms of real dollars. Warehouse stores demonstrated the highest sales per labor hour with $130.80. Super stores were next with $91.00, which equaled the in-

Gross Profit Margin



Net Profit Margin before taxes



dustry average, followed by conventional stores at $88.20 and combination stores at $87.00.

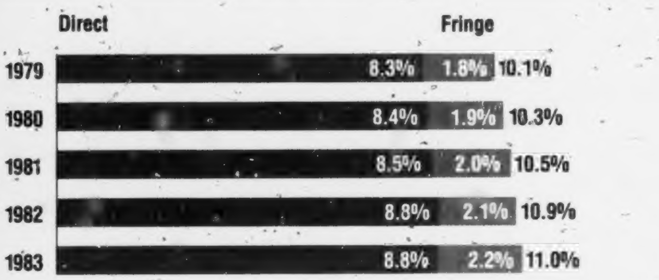
The typical supermarket in 1983 contained 28,000 square feet in total area. Combination stores averaged 45,875 square feet, followed by super stores, warehouse stores, and conventional stores. Combination stores also carried the largest number of items, averaging 25,000 and had the highest average retail price per item at $1.55. Warehouse stores averaged the lowest retail price per item, $1.18. The lowest average number of items carried were by warehouse stores with 9,000 items, although many of the super warehouse stores will carry up to 15,000 items.

Larger retailers, and particularly chains, relied on their own warehouses for over half of their products—56.6 percent. However, in 1983, almost one-fourth of all products arrived at stores via direct vendor deliveries. Independents relied more heavily on direct vendor deliveries than did chains, 33 percent to 25.7 percent.

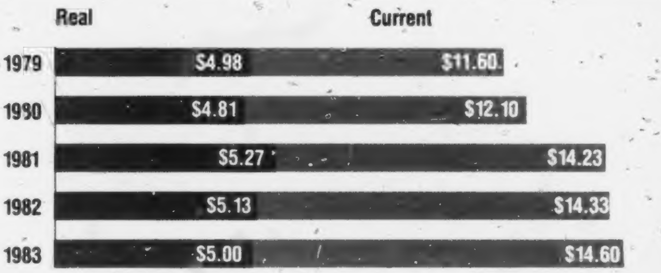
Percentage of Operation Supplied by

	All Companies	*Larger Retailer*	*Independent*
Own Warehouse	*51%*	*57%*	*5%*
Voluntary Wholesaler	*11%*	*11%*	*9%*
Cooperative Wholesaler	*8%*	*3%*	*47%*
Unaffiliated Wholesaler	*4%*	*4%*	*7%*
Direct Vendor Deliveries	*27%*	*57%*	*33%*

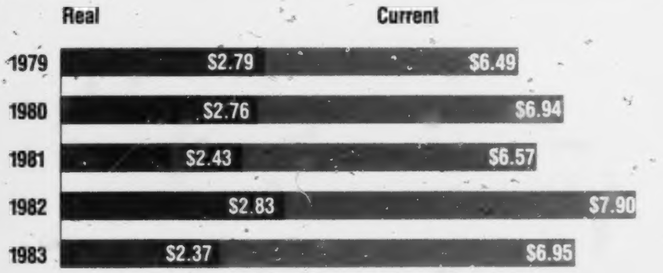
Total Store Labor Cost



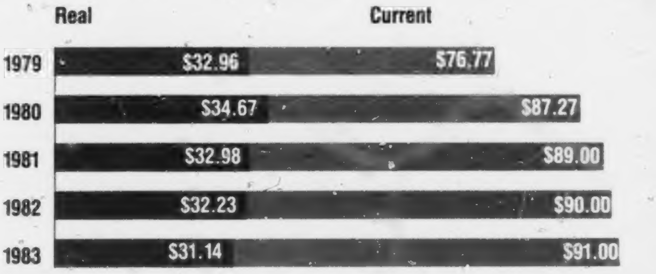
Sale Per Transaction



Sales Per Square Foot



Sales Per Labor Hour



DISTRIBUTION CENTERS

Transportation/Fleet

Most products arrive at supermarkets from distribution centers via the open highway. Among wholesale companies the most popular means are: common carriers, company trucks, and contract carriers. But among retailers, company trucks are the most popular followed by common carriers, and independent truckers. Only 7.5 percent of retailers' inbound truck loads are carried by contract carriers.

Typical Fleet Per Company	
Number of Trailers	
Refrigerated	*95*
Dry	*91*
Number of Tractors	
3-Axle	*69*
2-Axle	*13*
Ratio of Trailers to Tractors	*2.3*

Over 85 percent of the trailers used to deliver products are company owned. The rate is a little higher for retailers, and a little lower for wholesalers. The proportion of tractors owned is a little less—80.1 percent—than the trailers. Unlike trailers, however, more wholesale companies own tractors, than do retail companies. All in all, 88.5 percent of the truck fleet miles driven are driven on an owned rather than leased fleet.

Proportion of Fleet Owned

	Total	*Retailers*	*Wholesalers*
Trailers	*85.4%*	*87.6%*	*83.5%*
Tractors	*80.1%*	*77.9%*	*81.8%*

Dry Grocery Distribution Centers

The average total area for all dry grocery distribution centers was 230,000 square feet. Retail centers tended to be larger than wholesale centers. Additionally, the average number of items available in a center was is 7,000.

The average number of employees in dry centers is 88. The average number of inbound truck loads per week is 120, whereas the average number of inbound rail cars per week is nine. The average number of outbound vehicle loads per week is 150.

Dry Grocery Distribution Centers	
Average Total Area	
Total Centers	*230,000*
Retail Centers	*252,600*
Wholesale Centers	*200,000*

Looking at the productivity figures, the average number of cases stored and replenished per direct labor hour is 330, while the number selected per direct labor hour is 160.

Refrigerated Distribution Centers

This year FMI collected data for several types of refrigerated distribution centers. Following are results about some of these centers.

Produce

Produce distribution centers average about 40,000 square feet with retail centers being larger than wholesale centers. The average

Produce	
Average Number of Items Available	*488*
Less than 10,000	*—*
10,000-19,999	*250*
20,000-39,000	*294*
40,000-79,000	*610*
80,000 or more	*760*

Produce	
Average Number of Employees	*31*
Less than 10,000	*—*
10,000-19,999	*29*
20,000-39,999	*18*
40,000-79,999	*36*
80,000 or more	*67*

Produce	
Average Total Area	
Total Centers	*40,000*
Retail Centers	*40,540*
Wholesale Centers	*36,220*
Average Number of Inventory Turns	*75*
Less than 10,000	*—*
10,000-19,999	*100*
20,000-39,999	*75*
40,000-79,999	*71*
80,000 or more	*72*

Over half of all produce centers operate six to seven days per week, with about one-third operating five to six days per week. Produce centers average 63 inbound truck loads per week, and they ship an average of 47,400 cases per week.

An average of 420 cases are stored and replenished per direct labor hour. And the average scratch rate is two percent.

Meat

The average total area for meat distribution centers was 20,000 square feet. Forty-four percent of the meat distribution centers operated five days a week, 31 percent operated six days and 25 percent operated seven days a week. There is a clear preference on number of shifts per day, with almost three-quarters using two shifts per day. Thirty-five percent chose three shifts per day.

Meat	
Average Number of Cases Shipped per Week	*28,626*
Average Number of Cases Shipped per Direct Labor Hour	*250*
Average Number of Cases Selected per Direct Labor Hour	*144*
Average Number of Cases Stored and Replenished per Direct Labor Hour	*328*

The typical meat distribution center carried 480 items. And, these centers turned over their inventory over 52 times a year. Wholesalers processed 450 orders per week while retailers processed 286.

Although distribution centers can receive shipments via rail and truck, the typical center received 50 truck loads per week. Outbound, the average number of vehicle loads per week was 35. In terms of selection methods, all of the companies use manual selection.

With regard to distribution center productivity, the average number of cases shipped per direct labor hour was 250. The average number of cases stored and replenished per direct labor hour was 328. The average number of cases selected per direct labor hour was 144.

Meat	
Average Total Area in Square Feet	
Total Centers	*20,000*
Retail Centers	*32,000*
Wholesale Centers	*16,000*

The average number of supermarkets served per meat distribution center was 111. The average number of cases shipped per week was 28,626.

Dairy

The average total area for dairy distribution centers was 13,920 square feet. Distribution centers of retailers, at 15,720 square feet, were larger than those of wholesalers, at 13,605 square feet.

The dairy distribution centers showed a clear preference on the number of days they operated per week. Fifty-two percent operated five days a week. There was also a clear choice on number of shifts per day; 64 percent operated a two-shift day.

The typical dairy distribution center had an average of seven employees. Just about three-quarters of all dairy centers reported had employees who were unionized.

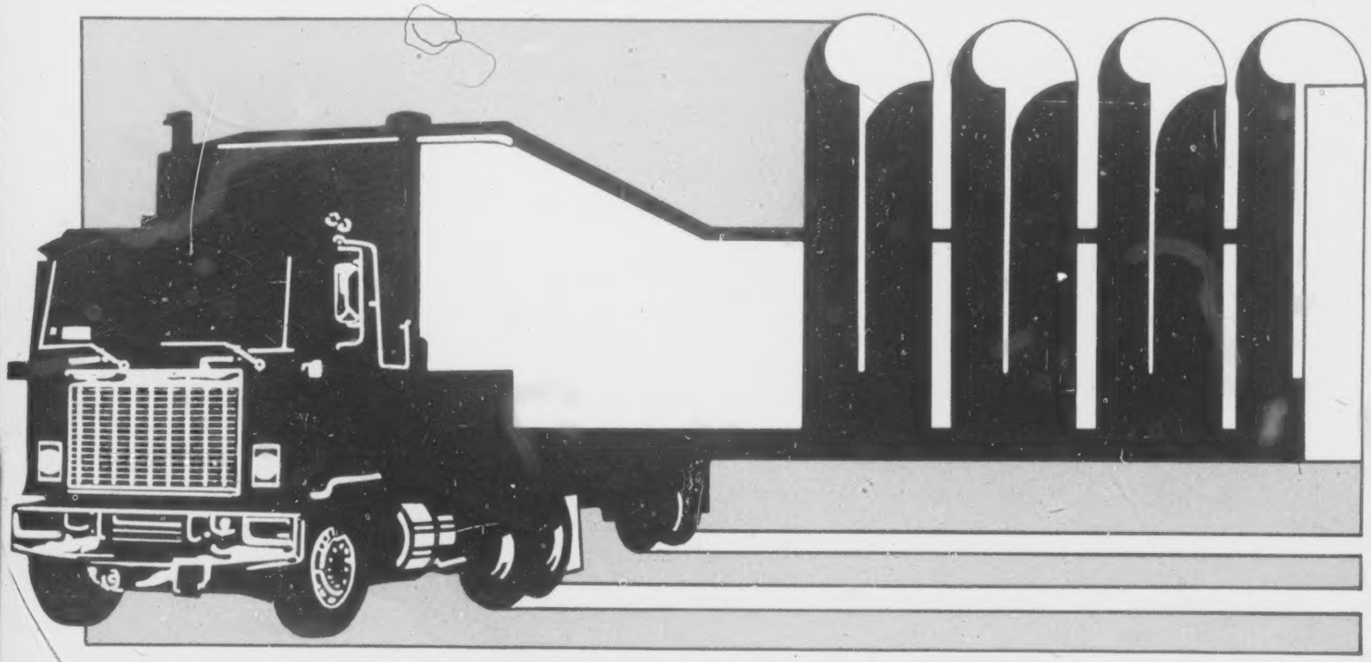
The typical dairy distribution center carried an average of 450 items, while the larger centers, those between 20,000 and 39,999 square feet in size, carried 588 items. The typical dairy distribution center turned its inventory over 22 times a year.

The typical dairy distribution center received 20 truck loads per week. It served 44 supermarkets and shipped about 22,845 cases per week. Wholesalers processed 250 orders weekly, while retailers processed fewer orders at 132.

Productivity measures for dairy centers show that the average number of cases shipped per direct labor hour was 345. The average number of cases stored and replenished per direct labor hour was 513. The average number of cases selected per direct labor hour was 197.

Number of Shifts Operated Per Day in Distribution Centers

	All Centers	Wholesale Centers	Retail Centers
Dry Grocery			
Less than one	0.9%	—	1.7%
One up to two	19.8%	1.7%	37.9%
Two up to three	48.3%	60.3%	36.2%
Three up to four	31.0%	37.9%	24.1%
Produce			
One up to two	19.4%	—	28.0%
Two up to three	61.1%	63.6%	60.0%
Three up to four	19.4%	36.4%	12.0%
Meat			
One up to two	—	—	—
Two up to three	64.7%	72.7%	50.0%
Three up to four	35.3%	27.3%	50.0%
Dairy			
Less than one	4.5%	—	10.0%
One up to two	9.1%	8.3%	10.0%
Two up to three	63.6%	66.7%	60.0%
Three up to four	22.7%	25.0%	20.0%



OPERATIONS

Produce Department

FMI first conducted a retail produce department survey for 1979 store operations. In that survey, the median percent of total selling area devoted to produce was eight percent with a middle range of eight to nine percent. In 1983, the area devoted to produce increased to 10 percent with greater variation in the middle range, 8 to 11 percent.

Eighty-three percent of the companies said the selling area devoted to produce had remained about the same from 1982 to 1983. About 16 percent said the area increased an average of three percent, and two percent said it decreased an average of two percent. Perhaps the rapid growth of this department over the last few years is beginning to stabilize.

In 1983, the produce department produced 8.5 percent of total sales. Since 1982, almost 55 percent of all companies increased their produce department sales as a percentage of total sales, but only by 1.7 percent. Twenty percent showed decreases of 1.5 percent, and 26 percent indicated that their produce sales remained the same.

The average number of employees in the produce department increased slightly from three in 1979 to three and one half today. Likewise, sales per labor hour have increased from $75 to $100; however, when adjusted for inflation, the real dollar increase was $32.20 in 1979 and $34.22, in 1983.

To determine what makes up these sales, companies checked from a list what items, besides standard produce items such as fruits and vegetables, were included in their produce sales. The most frequently included items were: refrigerated salad dressings, plants and flowers, health and snack mixes, and chilled juices. In addition, about 27 percent of the companies operated an orange juice machine in at least one of their stores. Overall, supermarkets carried more produce items in both summer and winter than they did in 1979.

Percentage of Companies Including Certain Items in Produce Sales	
Refrig. Salad Dressing	*78.4%*
Floral	*49.0%*
Health/Snack Mixes	*36.1%*
Chilled Juices	*27.4%*

Over three-fourths of all produce is displayed in bulk and over 70 percent is weighed at the front end, a 16 percent increase since 1979.

Produce-Related Services Available to Customers	
Recipes for Produce	*64.4%*
Information on Handling and Storage	*51.9%*
Eating Characteristics and Hints	*50.6%*
Produce Nutritional Information	*49.0%*

Many companies provide produce-related services to their customers, the most popular being recipes for produce, information on handling and storage, eating characteristics and hints, and, nutritional information.

Salad Bars

One of the hottest new trends in the supermarket industry has been the salad bar.

In 1983, salad bars represented three percent of total produce department sales. Approximately 3.2 percent of all stores had salad bars. Of those stores with salad bars, approximately 25 percent have an eating area available for their customers.

The average number of items carried in salad bars is about 30. About half of all stores with salad bars employ an average of 2.5 people who may be full or part-time, to take care of the salad bar. Almost 23 percent have one designated full-time employee.

In addition to providing all of these services for customers, many companies, over 46 percent, have formal produce identification training programs for their produce department employees. Thirty seven percent have programs for their cashiers, and 59 percent have identification accuracy standards.

Bulk Food

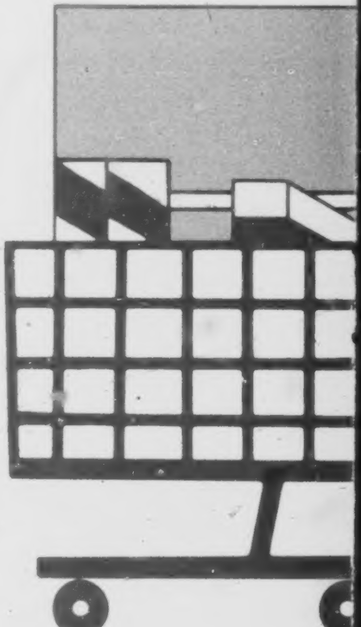
Another important supermarket trend in 1983 was the introduction of an old-fashioned merchandising technique—bulk food. While only 11.1 percent of all stores sold bulk food items, this practice was most popular in the mountain states where 55 percent sold them and in the northeastern states where 39 percent sold bulk food items.

Of those supermarkets selling bulk foods, the average number of items sold was 55. The most popular bulk foods, carried by at least 50 percent of the stores, were: nuts and seeds, trail-mix type product, dried fruit, grains and beans, coffees, peanut butter, preserves, and honey.

Scanning

A continually popular and growing trend in supermarket operations is scanning. In 1982, less than 17 percent of all companies were scanning 100 percent, by the end of 1983, that figure had risen to over 36 percent. Moreover, in 1983 almost two-thirds of all stores with scanning had a full-time person responsible for that function.

The primary uses of scanning data in 1983 were: monitoring



checker performance, specials, coupon accounting, work scheduling and new product evaluation.

Current Uses of Scanning POS Data	
Checker Performance	*96.9%*
Specials	*83.6%*
Coupon Accounting	*65.6%*
Work Scheduling	*62.5%*
New Product Evaluation	*50.8%*

Electronic Funds Transfer

Supermarket companies' use of and interest in Automated Tellers Machines (ATM) has grown phenomenally in recent years. As a result, companies are investing considerable time and expense in developing the type of machine which best fits their company's philosophy and their customers' attitudes. ATMs are offered as a service to customers, and just as are the many service departments which are being offered by companies, it has grown in recent years.

Location of ATMs	
Through the Wall	*20%*
Outside the Supermarket	*2%*
In front or in the Vestibule	*34%*
Near Checkouts	*33%*
Other	*12%*

According to FMI statistics, the percentage of stores with ATMs has increased in the past two years, from 4.5 percent in 1982 to 8.4 percent in 1983. Plus, 2.9 percent of the stores in the survey had non-ATM electronic banking service available.

ATM Ownership	
Banks	*37%*
Other Financial Institutions	*9%*
Supermarket Company	*22%*
Third Party Service Provider	*18%*
Other	*14%*

Of those stores with ATMs, approximately one third positioned the ATM near the store entry and a slightly lower number located them near the checkouts. In almost 40 percent of the cases, banks owned the machines; in 22 percent of the cases, the supermarket company owned the machine.

The majority of the transactions were cash dispensing, 66 percent, 20 percent were balance inquiry and 13 percent were deposit taking. The fact that some state laws do not allow machines taking cash deposits, certainly influences these results.

More companies in 1983 than in the previous year saw a decrease in the check volume at the front end, 16 percent in 1982 to 21 percent in 1983. However, six percent of the companies in 1983 had check volume increases, compared to no increases in 1982. In 1983 when asked the same question regarding cash volume, 74 percent responded that the amount of cash received remained the same, 14 percent said it decreased and 12 percent said it increased.

*Rating ATM Operation**	
Customer Convenience	*4.1%*
Ease of Use	*4.1%*
Overall Performance	*4.0%*
Maintenance	*4.0%*
Hardware Reliability	*3.9%*
Customer Acceptance	*3.7%*
Customer Usage	*3.3%*
Store Savings	*3.0%*

1 Indicating Poor and 5 Indicating Excellent

In rating ATM operation performance, companies were most pleased with customer convenience, ease of use of the machine, maintenance and overall performance of the system. Each of these categories received a 4.0 or 4.1 on a scale of 1 to 5, with 5 indicating excellent. Companies were most dissatisfied with store savings, rating this a neutral three.

In most cases, 51.5 percent, complaints about the ATM system were usually received by the bank or financial institution. In 48.5 percent of the cases, supermarket personnel received complaints.

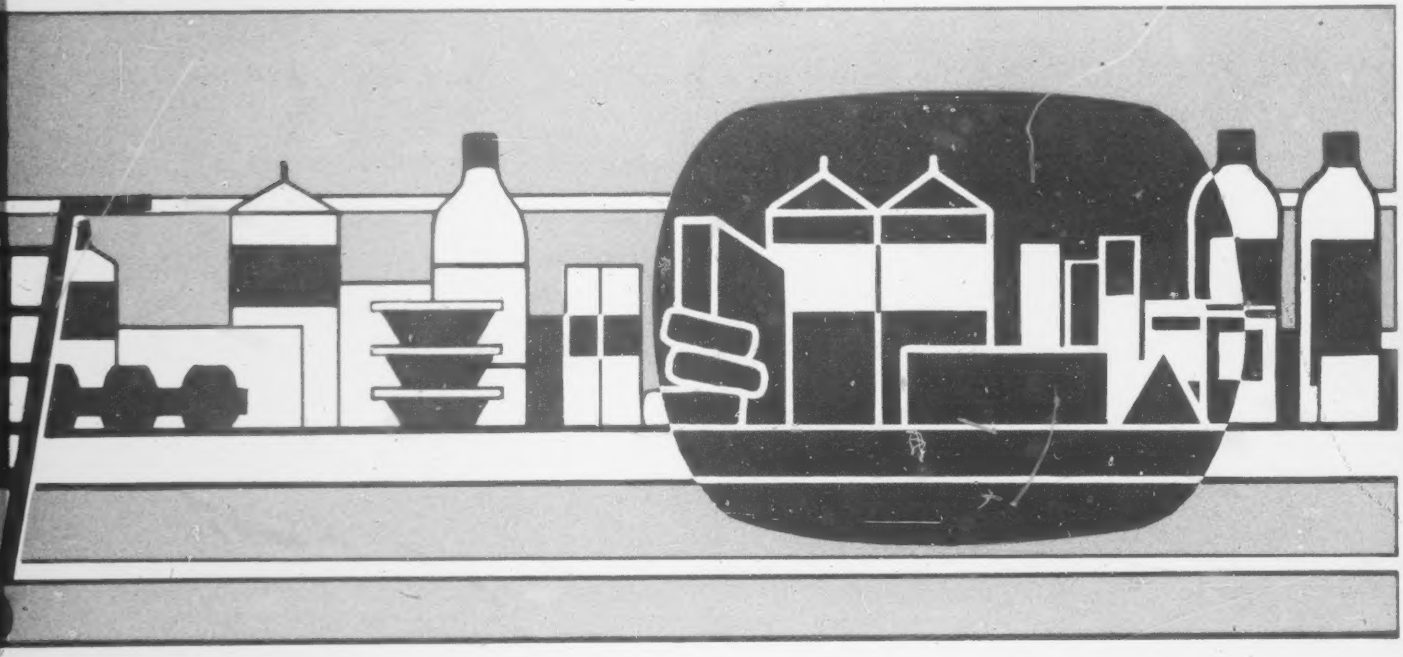
Medical Benefits Costs

Almost 10 percent of the companies responding to the survey offer high blood pressure control and alcohol and chemical abuse control programs to their employees. Fewer than this offer mental health counseling and smoking cessation programs.

Forty percent of the companies have first aid stations available. Health newsletters and brochures are available in 20 percent of the companies, and 14 percent have first aid specialists in their companies.

Over three quarters of the companies offering medical benefits require the employee to pay a deductible. Of the persons paying either individual deductions or family deductions over 35 percent saw an increase in the amount of their deduction.

Medical benefit costs were on the rise in 1983 with 82 percent of the companies reporting an average increase of 26 percent since 1981. Because of the high cost of medical benefits, 80 percent of the companies are considering alternatives for lowering the costs.



STORE DEVELOPMENT

Store Activity

There were fewer new stores built in 1983 than in 1982 or 1981. Three point seven percent of all stores in existence in 1983 were new, whereas 4.3 percent of all stores were closed and 6.3 percent were remodeled. Comparatively speaking, fewer stores opened, fewer stores closed, and fewer stores were remodeled than in 1982. The minimum rent increased for existing stores as did the expected total rent. Over two-thirds of all supermarkets are leased from another company while about 24 percent are owned. Another nine percent are leased from a subsidiary.

New Stores

Of the new stores that were built in 1983, over 41 percent were super stores, over 31 percent were combination stores, and over 16 percent were conventional stores. The new opening percentage for warehouse stores almost doubled to 8.4 from last year's 4.7 percent while the percentage of limited assortment stores continued to be the lowest of any category at 2.6 percent.

The typical new store built in 1983 averaged 38,000 square feet, $57.69 per square foot for total construction cost, and was in operation an average of twelve months before breaking even. New stores in the 80's are continuing to get larger as are the rents for new stores. In 1983, the average minimum rent was $5.52 per square foot while the expected total rent climbed to $6.09 per square foot.

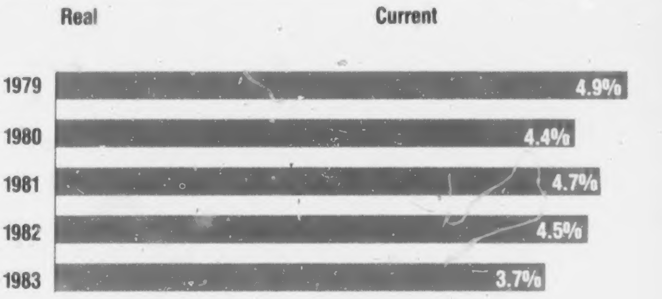
Closings

In 1983, 4.3 percent of all supermarkets closed. Almost 77 percent of those that closed were conventional stores, 14.6 percent were super stores, four percent were limited assortment stores, 3.4 percent were warehouse stores, and 1.2 percent were combination stores. From 1982 to 1983 store closings increased for all types of stores except for super stores.

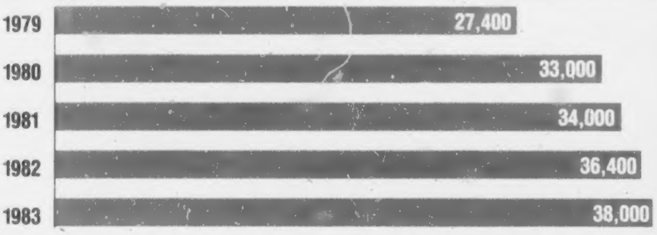
Remodels

Six and a third percent of the stores were remodeled in 1983. There was an average of seven years between major remodelings and 10 years from a stores first opening to their first remodeling. The typical total capital investment per supermarket for a major remodeling in 1983 was $400,000. The typical capital investment per square foot was $28.29.

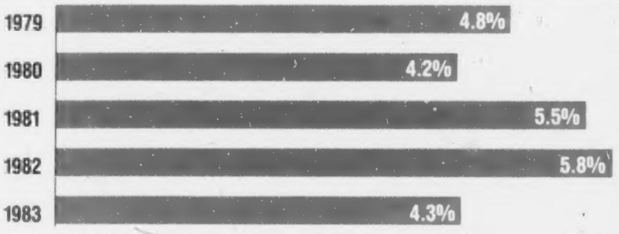
New Stores Opened



New Store Total Area in Square Feet



Stores Closed



APPENDIX

About the Study

This year's report is the result of food marketing companies participation in several FMI surveys, *Retail Operations*, *Distribution Center Operations*, *Operations Review* and *Facts about Store Development*. Nonmembers as well as members were invited to provide company data in many of the surveys. The sample description for five of these questionnaires are presented on the next page. These numbers represent information from approximately 20 percent of the companies invited to participate.

All averages shown in this report are median figures, except where noted. Medians provide a better industry average because the figures are not subject to distortion by unusual extremes. This is very important when a few companies differ very significantly from the marketing average.

When measuring real growth in retail sales and producitivity, *Speaks* uses the CPI food-at-home index as a deflator. The table below charts this deflator.

In this report, FMI defines a supermarket as a retail food store with annual sales of at least $2 million. This report is a summary of key findings of the surveys. Some, however, may have the need for more detailed facts and figures. The supporting tables for this report are found in the companion reports entitled *Detailed Tabulations form the Food Marketing Industry Speaks, 1984 and in Facts about Store Development.*

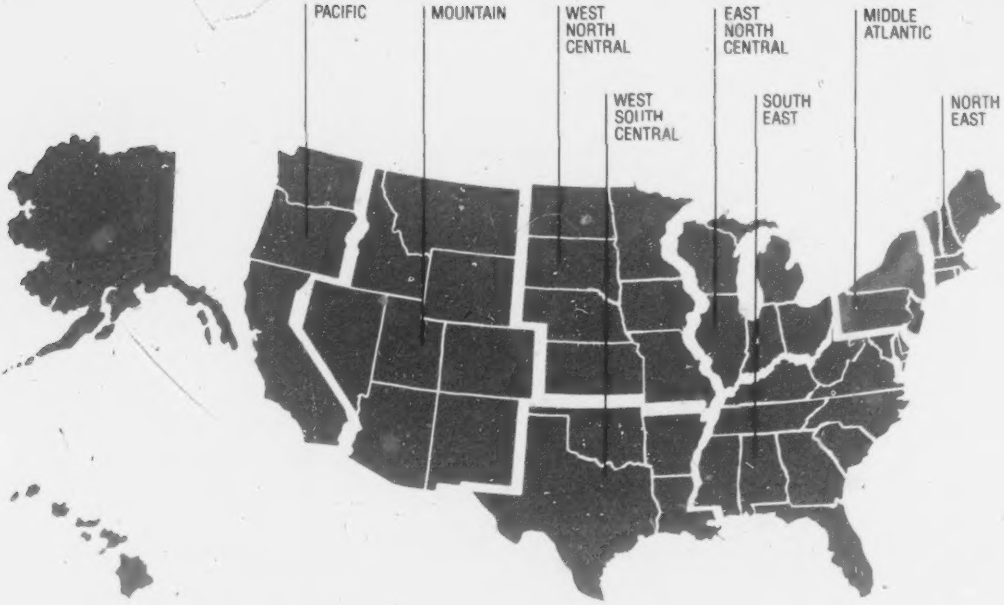
Index For Deflating Annual Supermarket Sales

	CPI Food at Home	% Increase
1974	162.4	14.9
1975	175.8	8.3
1976	179.5	2.4
1977	190.2	6.0
1978	210.2	10.5
1979	232.9	10.8
1980	251.5	8.0
1981	269.9	7.3
1982	279.2	3.4
1983	292.2	1.1

Trends in Operating Results

	1979	1980	1981	1982	1983
Gross Profit with Warehouse	22.3%	22.4%	23.0%	23.4%	23.7%
Gross Profit Without Warehouse	20.5%	20.9%	20.9%	21.2%	21.5%
Sales Per Labor Hour	$76.77	$87.27	$89.00	$90.00	$91.00
Sales Per Square Foot	$ 6.49	$ 6.94	$ 6.75	$ 7.90	$ 6.95
Sale Per Customer Transaction	$11.60	$12.10	$14.23	$14.33	$14.60
Average Hourly Labor Cost*	$ 5.92	$ 6.57	$ 7.64	$ 7.93	$ 8.79
Store Labor Expense	8.3%	8.4%	8.5%	8.8%	8.8%
Fringe Benefit Expense	1.8%	1.9%	2.0%	2.1%	2.2%
Net Profit (before taxes)	1.9%	1.5%	1.4%	1.5%	1.3%

*Excluding fringe benefits


PACIFIC
MOUNTAIN
WEST NORTH CENTRAL
WEST SOUTH CENTRAL
EAST NORTH CENTRAL
SOUTH EAST
MIDDLE ATLANTIC
NORTH EAST

Sample Description For *Food Marketing Industry Speaks*

Retail Operations Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (223)
Under $10	35.9%
$10-$30	22.8%
$31-$100	13.5%
$101-$250	9.9%
$251-$500	9.4%
Over $500	8.5%
	100.0%

EFT Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (321)
Under $10	27.4%
$10-$30	17.8%
$31-$100	20.2%
$101-$250	13.1%
$251-$500	8.4%
Over $500	13.1%
	100.0%

Distribution Center Operations Questionnaire

(Base) Company Sales (millions)	Sample Wholesale Companies (43)	Sample Retail Companies (38)
Under $30	4.6%	—
$31-$100	34.8%	10.5%
$101-$250	32.6%	23.7%
$251-$500	16.3%	23.7%
Over $500	11.7%	42.1%
	100.0%	100.0%

Produce Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (241)
Under $10	36.1%
$10-$30	24.9%
$31-$100	17.4%
$101-$250	8.3%
$251-$500	6.2%
Over $500	7.1%
	100.0%

Medical Benefits, Costs Questionnaire

(Base) Company Retail Sales (millions)	Sample Companies (261)
Under $10	30.8%
$10-$30	19.2%
$31-$100	11.5%
$101-$250	17.9%
$251-$500	7.7%
Over $500	12.8%
	100.0%

READER'S COMMENT FORM

Report: The Food Marketing Industry Speaks 1984

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Detailed Tabulations

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1984

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The Food Marketing Institute (FMI) is a non-profit association that conducts programs in research, education and public affairs on behalf of its 1,300 members—food retailers and wholesalers and their customers in the United States and overseas. FMI's domestic member companies operate over 17,000 retail food stores with a combined annual sales volume of $130 billion—half of all grocery sales in the United States. More than three-fourths of FMI's membership is comprised of independent supermarket operators or small regional firms. Its international membership includes more than 100 members from 40 nations.

Foreword

This publication is the companion report to The Food Marketing Industry Speaks, 1984. It contains the detailed tabulations for the information summarized in that report.

An annual survey of food wholesalers and retailers is the primary source of information for this report. Any data not taken from FMI's Speaks surveys are indicated by a footnote.

Data are for 1983. Company sales data are reported on an annual basis; productivity data, sales per labor hour, square foot or transaction, are reported on a weekly basis.

Except where noted, averages in these tables are mean figures; all others are medians. A median represents the halfway or middle figure when all figures are listed in order from the smallest to the largest. Medians are only presented when four or more companies in a category answered the question, except for distribution centers when it is three or more.

In addition to presenting data for wholesale and retail operations, Speaks, 1984 also includes a section on dry grocery and refrigerated food distribution centers. Figures in this section are presented for both wholesalers and retailers, as well as for all companies.

Subject areas explored in depth this year are the produce department, electronic funds transfer and medical benefits.

Data for store profiles are found in Tables 155A and 155B. In these tables sales and productivity figures are presented for four different types of grocery stores. For example, average sale per customer transaction is shown for conventional stores, super stores, combination stores and warehouse stores.

In order to insure the confidentiality of individual companies, some data within different subcategories have been changed plus or minus one percent.

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TABLE 1

GEOGRAPHIC REGION OF WHOLESALE HEADQUARTERS

	ALL WHOLESALE COMPANIES	1983 WHOLESALE SALES (MILLIONS OF DOLLARS)					WHOLESALE AFFILIATION		
		30 OR LESS	31-100	101-250	251-500	OVER 500	COOP-ERATIVE	VOLUN-TARY	UNAFFI-LIATED
ALL COMPANIES	50	2	17	15	9	7	19	26	5
NORTHEAST	4.0		5.9	6.7	-	-	5.3	3.8	-
MIDDLE ATLANTIC	32.0		23.5	40.0	33.3	14.3	21.1	34.6	60.0
EAST NORTH CENTRAL	18.0		11.8	26.7	-	42.9	21.1	19.2	-
WEST NORTH CENTRAL	6.0		11.8	6.7	-	-	5.3	7.7	-
SOUTHEAST	18.0		17.6	20.0	33.3	-	26.3	11.5	20.0
WEST SOUTH CENTRAL	8.0		17.6	-	11.1	-	-	15.4	-
MOUNTAIN	-		-	-	-	-	-	-	-
PACIFIC	12.0		5.9	-	22.2	42.9	21.1	3.8	20.0
CANADA	2.0		5.9	-	-	-	-	3.8	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

WHOLESALE OPERATIONS

TABLE 2A

AVERAGE PERCENT CHANGE IN WHOLESALE SALES 1982 VS 1983

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	4.1	1.1	10.2	48
REGION				
NORTHEAST				2
MIDDLE ATLANTIC	4.5	.7	15.6	15
EAST NORTH CENTRAL	2.9	1.0	3.2	9
WEST NORTH CENTRAL				2
SOUTHEAST	5.8	1.9	13.5	9
WEST SOUTH CENTRAL	5.2	-22.7	14.8	4
MOUNTAIN	-	-	-	-
PACIFIC	4.6	.9	7.6	6
CANADA				1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 2B

AVERAGE PERCENT CHANGE IN WHOLESALE SALES 1982 VS 1983

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	4.1	1.1	10.2	48
COMPANY WHOLESALE SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS				2
31-100	4.4	.3	13.0	16
101-250	5.1	1.9	10.7	14
OVER 250	4.8	1.1	12.3	16
NUMBER OF SUPERMARKETS SERVED				
1-10				2
11-50	4.4	.0	6.2	14
51-100	4.6	2.4	20.9	12
OVER 100	4.0	1.0	7.7	11
WHOLESALE AFFILIATION				
COOPERATIVE	3.8	1.4	7.6	18
VOLUNTARY	3.7	.7	8.6	26
UNAFFILIATED	11.2	-.8	26.1	4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 3
PERCENTAGE OF ANNUAL SALES VOLUME ATTRIBUTED TO -- SUMMARY TABLE OF MEANS

	ALL WHOLESALE COMPANIES	1983 WHOLESALE SALES (MILLIONS OF DOLLARS)				
		30 OR LESS	31-100	101-250	251-500	OVER 500
INDEPENDENT FOOD STORES	75.0	.3	70.3	61.7	48.1	91.5
CORPORATELY OWNED STORES	14.5	1.1	6.6	24.2	27.7	7.9
OTHER FOOD CHAINS	4.0	.0	4.0	3.5	13.6	.6
CONVENIENCE STORES	3.1	.0	12.8	1.6	7.4	.0
RESTAURANTS	1.6	28.6	3.1	5.9	.4	.0
HOSPITALS	.7	44.8	.7	1.6	.7	.0
SCHOOLS	.4	25.2	.7	1.0	.3	.0
OTHER	.6	.0	1.7	.5	1.9	.0

NOTE: DATA WEIGHTED BY 1983 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 4
AVERAGE SALES PER RETAIL STORE SERVED -- IN MILLIONS OF DOLLARS

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	2.18	1.29	3.43	40
COMPANY WHOLESALE SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS	-	-	-	-
31-100	1.94	1.00	3.57	15
101-250	2.09	1.34	2.66	14
OVER 250	2.50	1.59	3.73	11
WHOLESALE AFFILIATION				
COOPERATIVE	2.67	1.76	4.21	16
VOLUNTARY	1.94	1.13	2.76	20
UNAFFILIATED	1.36	.66	5.33	4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

WHOLESALE OPERATIONS

TABLE 5
SERVICES PROVIDED TO MEMBERSHIP

	ALL WHOLESALE COMPANIES	1983 WHOLESALE SALES (MILLIONS OF DOLLARS) 30 OR LESS	31-100	101-250	251-500	OVER 500
TOTAL	49	2	16	15	9	7
HANDLE PRIVATE LABEL	98.0		93.8	100.0	100.0	100.0
INDIVIDUAL RETAIL PRICING	95.9		93.8	93.3	100.0	100.0
PRODUCT MOVEMENT DATA	89.8		93.8	93.3	88.9	85.7
HANDLE GENERIC LABEL	89.8		87.5	93.3	100.0	85.7
ADVERTISING	87.8		87.5	80.0	100.0	100.0
EQUIPMENT PROCUREMENT	81.6		81.3	80.0	88.9	85.7
GROSS MARGIN REPORT BY ITEM	81.6		87.5	73.3	88.9	85.7
REAL ESTATE & STORE ENGINEERING	75.5		68.8	80.0	88.9	71.4
RETAIL ACCOUNTING	73.5		68.8	66.7	88.9	85.7
EDUCATION/TRAINING	69.4		50.0	73.3	88.9	85.7
INTERIOR DECOR & DESIGN	65.3		62.5	66.7	66.7	71.4
MEMBER PAYROLL	65.3		56.3	73.3	88.9	42.9
DISCOUNTS	65.3		75.0	40.0	77.8	71.4
SCANNING SUPPORT	59.2		43.8	60.0	77.8	71.4
EQUIPMENT & FIXTURE FINANCING	57.1		37.5	53.3	88.9	71.4
DSD SYSTEM	55.1		50.0	33.3	88.9	57.1
LEASE FINANCING	53.1		43.8	40.0	88.9	57.1
SPACE ALLOCATION	49.0		31.3	40.0	77.8	71.4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

DISTRIBUTION CENTER OPERATIONS

TABLE 6
PROFILE OF COMPANIES

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL COMPANIES	93	6	23	18	7	17	6	2	12	2
RETAILERS	46.2	66.7	30.4	50.0	57.1	47.1	33.3		50.0	
VOLUNTARY WHOLESALERS	28.0	16.7	39.1	27.8	28.6	17.6	66.7		8.3	
COOPERATIVE WHOLESALERS	20.4	16.7	17.4	22.2	14.3	29.4	-		33.3	
UNAFFILIATED WHOLESALERS	5.4	-	13.0	-	-	5.9	-		8.3	

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 7A

DISTRIBUTION CENTERS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL COMPANIES	79	4	20	16	6	16	6	1	9	1
AVERAGE NUMBER OF MILES PER TRUCK TRIP	180.1	179.8	147.3	115.1	318.3	250.3	245.0		112.1	

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 7B

DISTRIBUTION CENTERS

		GEOGRAPHIC REGION OF DISTRIBUTION CENTER								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ALL COMPANIES	83	20	9	22	5	16	8	4	13	1
AVERAGE DISTANCE BETWEEN CENTER AND STORES SERVED	94.4	105.1	59.6	64.8	118.8	129.6	93.1	169.5	78.5	
WHOLESALER (AVG. MILES)	99.2	133.0	61.5	72.4	111.7	89.8	110.8	-	96.2	
RETAILER (AVG. MILES)	89.9	53.4	55.7	57.3	129.5	145.6	75.5	169.5	67.4	
LONGEST DISTANCE BETWEEN CENTER AND STORES SERVED	247.3	248.2	115.5	179.8	246.6	221.1	342.9	356.0	380.1	
WHOLESALER	254.6	295.0	109.8	198.5	250.0	248.2	261.3	-	412.0	
RETAILER	239.9	154.7	125.0	161.2	241.5	203.1	424.5	356.0	360.1	

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 8
PROPORTION OF FLEET OWNED VS LEASED

				1983 SALES (MILLIONS OF DOLLARS)					
	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	UNDER 10	10-30	31-100	101-250	251-500	OVER 500
TOTAL	89	40	49	-	2	20	23	18	26
PROPORTION OF TRAILERS OWNED	85.4	87.6	83.5	-		81.6	76.7	93.0	89.4
TOTAL	89	39	50	-	3	20	22	18	26
PROPORTION OF TRACTORS OWNED	80.1	77.9	81.8	-		78.8	71.8	90.8	78.5
TOTAL	71	27	44	-	2	16	20	17	16
PROPORTION OF TRUCK FLEET MILES DRIVEN ON OWNED FLEET	88.5	91.6	86.6	-		82.0	77.7	98.7	96.4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 9
TYPE OF TRAILERS/TRACTORS

				1983 SALES (MILLIONS OF DOLLARS)					
	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	UNDER 10	10-30	31-100	101-250	251-500	OVER 500
TOTAL COMPANIES	90	41	49	-	2	20	24	18	26
TRAILERS	186	298	92	-		28	47	96	512
REFRIGERATED	95	161	39	-		12	21	44	269
DRY	91	137	53	-		16	26	52	243
TOTAL COMPANIES	90	40	50	-	3	20	23	18	26
TRACTORS	82	125	48	-		19	25	48	213
3-AXLE	69	113	34	-		13	19	40	184
2-AXLE	13	12	14	-		6	6	8	29
TOTAL COMPANIES	89	40	49	-	2	20	23	18	26
RATIO TRAILERS TO TRACTORS	2.3	2.5	1.9	-		1.4	2.0	2.0	2.4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 10
TRUCK FLEET

	TOTAL COMPANIES	RETAIL COMPANIES	WHOLESALE COMPANIES	1983 SALES (MILLIONS OF DOLLARS) UNDER 10	10-30	31-100	101-250	251-500	OVER 500
TOTAL COMPANIES	84	37	47	-	2	16	22	18	26
TOTAL NUMBER OF TRUCK FLEET MILES	10963643	21878944	2370746	-		835455	1140173	2499796	32174961
TOTAL COMPANIES	79	35	44	-	2	17	21	16	23
TOTAL DOLLAR AMOUNT SPENT FOR FUEL	1065951	1842700	448083	-		184609	265255	531610	2903960
TOTAL COMPANIES	76	34	42	-	2	16	20	16	22
TOTAL GALLONS PURCHASED	1033515	1765953	440588	-		178230	238556	503245	2850410
TOTAL COMPANIES	81	36	45	-	2	16	20	17	26
AVERAGE FLEET MILES PER GALLON	5.5	5.6	5.3	-		5.3	5.1	5.3	5.5
TOTAL COMPANIES	84	37	47	-	2	16	22	18	26
FLEET MILES PER TRACTOR	151490	284607	46696	-		40677	49655	52704	383979
TOTAL COMPANIES	76	34	42	-	2	16	20	16	22
DOLLARS PER GALLON	1.10	1.11	1.08	-		1.09	1.15	1.08	1.06

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 11A

NUMBER OF DRIVERS EMPLOYED IN A TYPICAL WEEK PER COMPANY

		NUMBER OF TRACTORS		
	ALL COMPANIES	25 AND UNDER	26-99	100 AND OVER
TOTAL	90	33	45	11
FULL-TIME	116.8	16.8	68.8	622.5
COMPANY	113.1	16.8	63.4	615.3
HIRED SERVICE	3.7	.0	5.4	7.3
PART-TIME	4.4	1.3	5.3	10.7
COMPANY	3.7	1.1	4.0	10.7
HIRED SERVICE	.7	.2	1.3	.0
TOTAL	89	33	45	11
WEIGHTED RATIO OF TOTAL FULL-TIME DRIVERS TO TRACTORS	1.48	1.34	1.40	1.52

NOTE: UNWEIGHTED DATA, EXCEPT FOR DRIVERS/TRACTORS RATIO, WHICH IS WEIGHTED BY 1983 SALES

TABLE 11B

NUMBER OF DRIVERS EMPLOYED IN A TYPICAL WEEK PER COMPANY

		NUMBER OF TRACTORS				NUMBER OF TRACTORS		
	ALL RETAIL COMPANIES	25 AND UNDER	26-99	100 AND OVER	ALL WHOLESALE COMPANIES	25 AND UNDER	26-99	100 AND OVER
TOTAL	41	13	21	6	49	20	24	5
FULL-TIME	185.0	13.8	77.5	960.3	59.8	18.8	61.1	217.2
COMPANY	180.6	13.8	69.7	960.3	56.6	18.8	57.9	201.2
HIRED SERVICE	4.3	.1	7.8	.0	3.2	.0	3.3	16.0
PART-TIME	5.7	1.0	6.2	14.8	3.4	1.4	4.5	5.8
COMPANY	4.3	.9	3.5	14.8	3.3	1.3	4.5	5.8
HIRED SERVICE	1.4	.1	2.7	.0	.1	.2	.1	.0
TOTAL	40	13	21	6	49	20	24	5
WEIGHTED RATIO OF TOTAL FULL-TIME DRIVERS TO TRACTORS	1.52	1.36	1.43	1.54	1.30	1.31	1.33	1.27

NOTE: UNWEIGHTED DATA, EXCEPT FOR DRIVERS/TRACTORS RATIO, WHICH IS WEIGHTED BY 1983 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 12A

PERCENTAGE OF INBOUND TRUCK LOADS DELIVERED BY

		1983 RETAIL SALES (MILLIONS OF DOLLARS)					
	ALL RETAIL COMPANIES	UNDER 10	10-30	31-100	101-250	251-500	OVER 500
TOTAL	38	-	-	4	9	9	16
COMPANY TRUCKS/BACKHAUL	31.0	-	-	5.1	10.8	19.4	32.6
COMMON CARRIER	26.8	-	-	53.0	45.4	30.5	25.9
INDEPENDENT TRUCKER	24.2	-	-	14.2	11.1	13.2	25.4
SUPPLIERS' PRIVATE CARRIER	10.5	-	-	22.4	22.2	20.4	9.4
CONTRACT CARRIER	7.5	-	-	5.3	10.5	16.5	6.8

		GEOGRAPHIC REGION OF RETAILER HEADQUARTERS								
	ALL RETAIL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	38	3	7	8	4	8	2	1	4	1
COMPANY TRUCKS/BACKHAUL	31.0		19.8	6.8	20.0	24.7			35.3	
COMMON CARRIER	26.8		41.0	36.6	16.7	38.5			24.3	
INDEPENDENT TRUCKER	24.2		17.2	9.8	27.1	14.6			27.1	
SUPPLIERS' PRIVATE CARRIER	10.5		13.2	25.6	8.2	16.6			9.3	
CONTRACT CARRIER	7.5		8.8	21.2	28.0	5.5			4.0	

TABLE 12B

PERCENTAGE OF INBOUND TRUCK LOADS DELIVERED BY

		1983 WHOLESALE SALES (MILLIONS OF DOLLARS)				
	ALL WHOLESALE COMPANIES	30 OR LESS	31-100	101-250	251-500	OVER 500
TOTAL	43	2	15	14	7	5
COMMON CARRIER	36.2		50.4	36.6	52.3	21.6
COMPANY TRUCKS/BACKHAUL	20.0		15.2	18.5	13.3	26.5
CONTRACT CARRIER	16.6		10.9	15.9	9.9	22.9
SUPPLIERS' PRIVATE CARRIER	13.7		10.2	12.7	8.2	18.5
INDEPENDENT TRUCKER	13.6		13.7	16.2	16.3	10.5

		GEOGRAPHIC REGION OF WHOLESALER HEADQUARTERS								
	ALL WHOLESALE COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	43	2	13	8	3	7	4	-	5	1
COMMON CARRIER	36.2		40.6	28.5		55.0	62.8	-	20.8	
COMPANY TRUCKS/BACKHAUL	20.0		17.1	19.7		14.9	7.3	-	29.3	
CONTRACT CARRIER	16.6		11.8	21.3		4.1	7.2	-	27.1	
SUPPLIERS' PRIVATE CARRIER	13.7		18.4	20.1		3.5	8.6	-	8.5	
INDEPENDENT TRUCKER	13.6		12.2	10.4		22.5	14.2	-	14.4	

NOTE: DATA WEIGHTED BY 1983 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 13

AVERAGE TOTAL AREA IN SQUARE FEET OF THE DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	230,000	119,137	351,935	116
RETAIL CENTERS	252,600	112,000	350,000	58
WHOLESALE CENTERS	200,000	132,000	352,580	58

TABLE 14

AVERAGE NUMBER OF EMPLOYEES IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	88	42	141	115
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	31	12	51	22
100,000-199,999	46	37	66	25
200,000-299,999	68	60	107	31
300,000-399,999	144	126	178	14
400,000 OR MORE	188	129	268	23

TABLE 15

AVERAGE NUMBER OF SUPERMARKETS SERVED PER DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	63	40	129	110
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	36	21	63	19
100,000-199,999	38	26	77	24
200,000-299,999	62	50	81	30
300,000-399,999	113	80	151	14
400,000 OR MORE	149	80	295	23

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 16

TYPE OF SELECTION METHOD IN DRY GROCERY DISTRIBUTION CENTER/SECTION

		SIZE OF DRY GROCERY DISTRIBUTION CENTER/SECTION				
	ALL CENTERS	LESS THAN 100,000	100,000 TO 199,999	200,000 TO 299,999	300,000 TO 399,999	400,000 OR MORE
ALL CENTERS	106	18	24	30	12	22
MANUAL SELECTION	90.6	100.0	95.8	90.0	91.7	77.3
SELECT TO CONVEYOR	7.5	-	4.2	10.0	8.3	13.6
AUTOMATED SELECTION	1.9	-	-	-	-	9.1

TABLE 17

AVERAGE NUMBER OF CASES SHIPPED PER WEEK IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	145,805	65,000	260,000	111
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	49,000	17,000	90,000	19
100,000-199,999	71,200	55,000	100,000	26
200,000-299,999	152,193	110,000	205,000	30
300,000-399,999	300,000	260,000	329,684	14
400,000 OR MORE	362,050	240,000	500,000	22

TABLE 18

AVERAGE NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	210	110	596	92
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	250	124	450	17
100,000-199,999	149	94	337	20
200,000-299,999	187	116	700	23
300,000-399,999	143	107	425	13
400,000 OR MORE	635	153	975	19

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 19

AVERAGE NUMBER OF CASES SHIPPED PER TOTAL LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	70	55	89	98
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	55	33	74	17
100,000-199,999	79	47	145	22
200,000-299,999	73	58	89	25
300,000-399,999	68	50	73	12
400,000 OR MORE	75	59	110	22

TABLE 20

AVERAGE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	160	135	200	106
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	143	112	188	18
100,000-199,999	145	125	180	25
200,000-299,999	170	137	192	27
300,000-399,999	171	150	200	13
400,000 OR MORE	187	160	250	23

TABLE 21

AVERAGE NUMBER OF CASES STORED AND REPLENISHED PER DIRECT LABOR HOUR IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	330	218	517	85
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	306	245	448	14
100,000-199,999	252	165	364	16
200,000-299,999	351	216	542	24
300,000-399,999	330	188	398	13
400,000 OR MORE	363	285	600	18

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING IN[illegible]TE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 22

AVERAGE NUMBER OF INBOUND TRUCK LOADS PER WEEK -- DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	120	75	241	111
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	63	30	85	22
100,000-199,999	83	61	104	24
200,000-299,999	135	100	235	31
300,000-399,999	252	220	325	14
400,000 OR MORE	280	214	369	20

TABLE 23

AVERAGE NUMBER OF INBOUND RAIL CARS PER WEEK -- DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	9.0	4.0	20.0	87
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	3.0	1.3	7.0	8
100,000-199,999	5.0	3.0	9.0	18
200,000-299,999	7.0	5.0	15.0	26
300,000-399,999	18.0	15.0	30.0	14
400,000 OR MORE	20.0	8.0	25.0	21

TABLE 24

AVERAGE NUMBER OF OUTBOUND VEHICLE LOADS PER WEEK IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	150.0	80.0	260.0	106
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	50.0	30.0	72.0	17
100,000-199,999	84.5	56.3	139.5	24
200,000-299,999	150.0	115.0	200.0	31
300,000-399,999	295.0	250.0	358.0	14
400,000 OR MORE	342.5	275.3	495.0	20

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 25A

AVERAGE NUMBER OF ITEMS AVAILABLE IN DRY GROCERY DISTRIBUTION CENTER/SECTION ALL CENTERS

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	6000	4500	7440	113
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	2200	900	5500	21
100,000-199,999	6400	5000	7200	25
200,000-299,999	6450	4900	8200	31
300,000-399,999	6300	4544	7100	13
400,000 OR MORE	6177	5000	7500	23

TABLE 25B

AVERAGE NUMBER OF ITEMS AVAILABLE IN DRY GROCERY DISTRIBUTION CENTER/SECTION WHOLESALE CENTERS

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	7000	6000	8000	57
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	5400	3869	7500	9
100,000-199,999	6650	5974	7289	18
200,000-299,999	8242	7110	9491	12
300,000-399,999	7100	6450	7500	7
400,000 OR MORE	6500	5300	8000	11

TABLE 25C

AVERAGE NUMBER OF ITEMS AVAILABLE IN DRY GROCERY DISTRIBUTION CENTER/SECTION RETAIL CENTERS

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	4950	3999	6056	56
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	1100	884	4525	12
100,000-199,999	4600	3800	6400	7
200,000-299,999	5100	4300	6450	19
300,000-399,999	4522	4400	5000	6
400,000 OR MORE	5484	4850	6269	12

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 26

AVERAGE NUMBER OF INVENTORY TURNS IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	15	13	17	111
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	14	11	17	19
100,000-199,999	14	13	16	25
200,000-299,999	15	13	17	30
300,000-399,999	17	15	19	14
400,000 OR MORE	17	14	18	23

TABLE 27

CURRENT SCRATCH RATE IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	4.0	2.0	5.5	103
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 100,000	5.5	2.0	8.0	18
100,000-199,999	4.6	2.7	6.0	22
200,000-299,999	3.7	.7	5.2	28
300,000-399,999	3.9	2.6	5.0	12
400,000 OR MORE	3.0	.8	4.0	23

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 28A

AVERAGE WHOLESALE DRY GROCERY DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY

	MEDIAN	MIDDLE RANGE		N=
ALL WHOLESALE CENTERS	405	275	700	54
COMPANY SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS				1
31-100	349	161	600	16
101-250	337	239	485	12
OVER 250	549	332	1050	25

TABLE 28B

AVERAGE RETAIL DRY GROCERY DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	173	111	266	55
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10				3
10-30				3
31-100				3
101-250	95	45	136	8
251-500	159	129	177	12
OVER 500	239	187	398	26

TABLE 28C

AVERAGE RETAIL DRY GROCERY DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	173	111	266	55
MANUAL SELECTION	168	102	260	47
SELECT TO CONVEYOR	218	150	266	5
AUTOMATED SELECTION	-	-	-	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 20

SHIFTS PER DAY, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN DRY GROCERY DISTRIBUTION CENTER/SECTION

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	116	58	58
SHIFTS PER DAY			
LESS THAN 1	.9	1.7	-
ONE UP TO TWO	19.8	37.9	1.7
TWO UP TO THREE	48.3	36.2	60.3
THREE UP TO FOUR	31.0	24.1	37.9
FOUR OR MORE	-	-	-
ALL CENTERS	114	57	57
DAYS OF OPERATION PER WEEK			
LESS THAN FIVE	-	-	-
FIVE UP TO SIX	56.1	56.1	56.1
SIX UP TO SEVEN	37.7	40.4	35.1
SEVEN	6.1	3.5	8.8
ALL CENTERS	111	54	57
EMPLOYEES UNIONIZED			
YES	76.6	72.2	80.7
NO	23.4	27.8	19.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 30

AVERAGE TOTAL AREA IN SQUARE FEET OF THE REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	40,000	20,158	69,175	36
RETAIL CENTERS	40,540	30,200	70,100	25
WHOLESALE CENTERS	36,220	15,000	56,000	11

TABLE 31

AVERAGE NUMBER OF EMPLOYEES IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	31	15	46	36
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	29	5	35	7
20,000-39,999	18	11	28	10
40,000-79,999	36	31	46	13
80,000 OR MORE	67	44	88	6

TABLE 32

AVERAGE NUMBER OF SUPERMARKETS SERVED PER REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	65	39	114	35
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	24	15	114	7
20,000-39,999	41	36	45	9
40,000-79,999	81	58	105	13
80,000 OR MORE	112	97	129	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 33

AVERAGE NUMBER OF CASES SHIPPED PER WEEK IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	47,400	22,000	89,400	33
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	14,979	7,500	29,000	6
20,000-39,999	34,000	21,019	45,072	9
40,000-79,999	62,000	47,414	85,000	13
80,000 OR MORE	153,855	104,600	180,000	5

TABLE 34

AVERAGE NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	220	84	594	28
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	83	59	125	6
20,000-39,999	137	76	792	6
40,000-79,999	331	92	615	12
80,000 OR MORE	538	316	1226	4

TABLE 35

AVERAGE NUMBER OF CASES SHIPPED PER TOTAL LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	64	45	125	30
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	61	22	125	6
20,000-39,999	57	37	139	7
40,000-79,999	64	53	81	12
80,000 OR MORE	81	53	450	5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 36

AVERAGE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	150	125	175	33
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	125	63	175	7
20,000-39,999	147	140	171	7
40,000-79,999	156	136	175	13
80,000 OR MORE	168	150	206	6

TABLE 37

AVERAGE NUMBER OF CASES STORED AND REPLENISHED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	420	300	600	26
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	218	175	284	6
20,000-39,999	475	368	627	7
40,000-79,999	600	380	793	8
80,000 OR MORE	420	417	436	5

TABLE 38

AVERAGE NUMBER OF INBOUND TRUCK LOADS PER WEEK -- REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	63	35	120	35
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	30	25	60	6
20,000-39,999	56	35	70	10
40,000-79,999	75	43	120	13
80,000 OR MORE	177	100	270	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 39

AVERAGE NUMBER OF OUTBOUND VEHICLE LOADS PER DAY IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	82.0	50.0	150.0	27
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	46.5	20.8	130.0	4
20,000-39,999	74.5	43.0	93.0	8
40,000-79,999	72.5	50.0	107.0	10
80,000 OR MORE	245.0	150.0	268.0	5

TABLE 40

AVERAGE NUMBER OF ITEMS AVAILABLE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	488	250	800	35
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	250	200	872	7
20,000-39,999	294	210	625	9
40,000-79,999	610	350	800	13
80,000 OR MORE	760	339	1200	6

TABLE 41

AVERAGE NUMBER OF INVENTORY TURNS IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	75	57	111	31
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	100	38	156	7
20,000-39,999	75	41	119	7
40,000-79,999	71	61	102	12
80,000 OR MORE	72	65	83	5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 42

CURRENT SCRATCH RATE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	2.0	0.9	3.5	23
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999	3.0	1.8	3.5	5
20,000-39,999	2.0	.6	3.1	4
40,000-79,999	2.0	1.5	5.5	10
80,000 OR MORE	1.1	.2	4.2	4

TABLE 43A

AVERAGE WHOLESALE REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
ALL WHOLESALE CENTERS	454	405	695	8
COMPANY SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS	-	-	-	-
31-100	-	-	-	-
101-250				3
OVER 250	457	450	760	5

TABLE 43B

AVERAGE RETAIL REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- PRODUCE

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	238	148	341	24
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	-	-	-	-
10-30				3
31-100				2
101-250				3
251-500				3
OVER 500	301	243	393	13

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 44

SHIFTS PER DAY, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	36	25	11
SHIFTS PER DAY			
LESS THAN 1	-	-	-
ONE UP TO TWO	19.4	28.0	-
TWO UP TO THREE	61.1	60.0	63.6
THREE UP TO FOUR	19.4	12.0	36.4
FOUR OR MORE	-	-	-
ALL CENTERS	34	25	9
DAYS OF OPERATION PER WEEK			
LESS THAN FIVE	-	-	-
FIVE UP TO SIX	32.4	28.0	44.4
SIX UP TO SEVEN	55.9	64.0	33.3
SEVEN	11.8	8.0	22.2
ALL CENTERS	33	24	9
EMPLOYEES UNIONIZED			
YES	84.8	91.7	66.7
NO	15.2	8.3	33.3

TABLE 45

AVERAGE TOTAL AREA IN SQUARE FEET OF THE REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	20,000	12,450	27,000	17
RETAIL CENTERS	32,000	14,000	50,000	6
WHOLESALE CENTERS	16,000	8,293	23,520	11

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 46

AVERAGE NUMBER OF EMPLOYEES IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	19	9	31	17
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	10	4	19	4
10,000-19,999	22	9	38	4
20,000-39,999	13	9	23	6
40,000-79,999				2
80,000 OR MORE				1

TABLE 47

AVERAGE NUMBER OF SUPERMARKETS SERVED PER REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	111	62	150	16
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	78	25	126	4
10,000-19,999	129	100	151	4
20,000-39,999	63	61	100	5
40,000-79,999				2
80,000 OR MORE				1

TABLE 48

TYPE OF SELECTION METHOD IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

		SIZE OF REFRIGERATED DISTRIBUTION CENTER/SECTION				
	ALL CENTERS	LESS THAN 10,000	10,000 TO 19,999	20,000 TO 39,999	40,000 TO 79,999	80,000 OR MORE
ALL CENTERS	15	3	3	6	2	1
MANUAL SELECTION	100.0			100.0		
SELECT TO CONVEYOR	-			-		
AUTOMATED SELECTION	-			-		

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 49

AVERAGE NUMBER OF CASES SHIPPED PER WEEK IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	28,626	11,082	71,380	16
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000-19,999	20,506	7,440	97,313	4
20,000-39,999	28,500	13,000	33,585	6
40,000-79,999				2
80,000 OR MORE				1

TABLE 50

AVERAGE NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	250	116	700	15
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000-19,999	339	89	534	4
20,000-39,999	200	190	228	5
40,000-79,999				2
80,000 OR MORE				1

TABLE 51

AVERAGE NUMBER OF CASES SHIPPED PER TOTAL LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	50	35	116	17
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	51	19	78	4
10,000-19,999	88	19	224	4
20,000-39,999	55	35	137	6
40,000-79,999				2
80,000 OR MORE				1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 52

AVERAGE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	144	100	158	16
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000-19,999	168	84	195	4
20,000-39,999	136	100	150	6
40,000-79,999				2
80,000 OR MORE				1

TABLE 53

AVERAGE NUMBER OF CASES STORED AND REPLENISHED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	328	233	691	11
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000-19,999				2
20,000-39,999	333	231	603	4
40,000-79,999				1
80,000 OR MORE				1

TABLE 54

AVERAGE NUMBER OF INBOUND TRUCK LOADS PER WEEK -- REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	50	36	105	16
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000-19,999	58	25	186	4
20,000-39,999	50	40	55	6
40,000-79,999				2
80,000 OR MORE				1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 55

AVERAGE NUMBER OF OUTBOUND VEHICLE LOADS PER WEEK IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	35.0	24.0	78.0	14
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000-19,999	29.5	21.0	71.8	4
20,000-39,999	32.5	16.5	46.3	4
40,000-79,999				2
80,000 OR MORE				1

TABLE 56

AVERAGE NUMBER OF ITEMS AVAILABLE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	480	300	900	17
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	560	195	1167	4
10,000-19,999	900	380	1163	4
20,000-39,999	425	379	500	6
40,000-79,999				2
80,000 OR MORE				1

TABLE 57

AVERAGE NUMBER OF INVENTORY TURNS IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	52	29	61	15
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	49	34	52	4
10,000-19,999	44	23	83	4
20,000-39,999	57	40	75	4
40,000-79,999				2
80,000 OR MORE				1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 58

CURRENT SCRATCH RATE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	1.5	0.3	4.0	14
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	1.5	.6	2.8	4
10,000-19,999				3
20,000-39,999	2.1	.1	4.8	4
40,000-79,999				2
80,000 OR MORE				1

TABLE 59A

AVERAGE WHOLESALE REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- MEAT

	MEDIAN	MIDDLE RANGE		N=
ALL WHOLESALE CENTERS	450	264	471	9
COMPANY SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS	-	-	-	-
31-100				2
101-250				1
OVER 250	450	264	471	6

TABLE 59B

AVERAGE RETAIL REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- MEAT

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	286	190	510	6
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	-	-	-	-
10-30	-	-	-	-
31-100	-	-	-	-
101-250	-	-	-	-
251-500	-	-	-	-
OVER 500	286	190	510	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 60

SHIFTS PER DAY, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	17	6	11
SHIFTS PER DAY			
LESS THAN 1	-	-	-
ONE UP TO TWO	-	-	-
TWO UP TO THREE	64.7	50.0	72.7
THREE UP TO FOUR	35.3	50.0	27.3
FOUR OR MORE	-	-	-
ALL CENTERS	16	6	10
DAYS OF OPERATION PER WEEK			
LESS THAN FIVE	-	-	-
FIVE UP TO SIX	43.8	16.7	60.0
SIX UP TO SEVEN	31.3	50.0	20.0
SEVEN	25.0	33.3	20.0
ALL CENTERS	16	6	10
EMPLOYEES UNIONIZED			
YES	81.3	83.3	80.0
NO	18.8	16.7	20.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 61

AVERAGE TOTAL AREA IN SQUARE FEET OF THE REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	13,920	9,436	22,000	22
RETAIL CENTERS	15,720	9,436	22,000	10
WHOLESALE CENTERS	13,605	8,150	23,000	12

TABLE 62

AVERAGE NUMBER OF EMPLOYEES IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	7	3	20	22
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	4	3	4	6
10,000-19,999	9	3	16	9
20,000-39,999	13	5	20	4
40,000-79,999				2
80,000 OR MORE				1

TABLE 63

AVERAGE NUMBER OF SUPERMARKETS SERVED PER REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	44	26	100	22
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	36	23	45	6
10,000-19,999	41	21	91	9
20,000-39,999	71	30	100	4
40,000-79,999				2
80,000 OR MORE				1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 64

TYPE OF SELECTION METHOD IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

		SIZE OF REFRIGERATED DISTRIBUTION CENTER/SECTION				
	ALL CENTERS	LESS THAN 10,000	10,000 TO 19,999	20,000 TO 39,999	40,000 TO 79,999	80,000 OR MORE
ALL CENTERS	20	5	9	3	2	1
MANUAL SELECTION	95.0	100.0	100.0			
SELECT TO CONVEYOR	5.0	-	-			
AUTOMATED SELECTION	-	-	-			

TABLE 65

AVERAGE NUMBER OF CASES SHIPPED PER WEEK IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	22,845	10,826	31,697	20
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	11,189	8,500	14,000	6
10,000-19,999	22,689	10,000	24,833	7
20,000-39,999	27,500	16,000	41,600	4
40,000-79,999				2
80,000 OR MORE				1

TABLE 66

AVERAGE NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	345	154	890	14
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	750	240	1303	4
10,000-19,999	133	41	196	4
20,000-39,999	700	225	868	4
40,000-79,999				2
80,000 OR MORE	-	-	-	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 67

AVERAGE NUMBER OF CASES SHIPPED PER TOTAL LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	102	61	141	17
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	141	136	160	5
10,000-19,999	50	35	118	6
20,000-39,999	113	66	481	4
40,000-79,999				2
80,000 OR MORE	-	-	-	-

TABLE 68

AVERAGE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	197	170	248	19
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	230	191	255	5
10,000-19,999	189	158	209	8
20,000-39,999	143	100	206	4
40,000-79,999				2
80,000 OR MORE	-	-	-	-

TABLE 69

AVERAGE NUMBER OF CASES STORED AND REPLENISHED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	513	434	840	14
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	511	446	600	5
10,000-19,999	515	270	1069	5
20,000-39,999				3
40,000-79,999				1
80,000 OR MORE	-	-	-	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 70

AVERAGE NUMBER OF INBOUND TRUCK LOADS PER WEEK -- REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	20	11	40	21
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	12	10	14	6
10,000-19,999	19	6	22	8
20,000-39,993	33	18	69	4
40,000-79,999				2
80,000 OR MORE				1

TABLE 71

AVERAGE NUMBER OF OUTBOUND VEHICLE LOADS PER DAY IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	29.0	15.6	74.0	17
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	18.1	3.0	42.0	6
10,000-19,999	16.8	7.7	38.3	4
20,000-39,999	49.5	24.3	244.3	4
40,000-79,999				2
80,000 OR MORE				1

TABLE 72

AVERAGE NUMBER OF ITEMS AVAILABLE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	450	359	599	21
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	359	302	375	5
10,000-19,999	433	359	540	9
20,000-39,999	588	463	1669	4
40,000-79,999				2
80,000 OR MORE				1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 73

AVERAGE NUMBER OF INVENTORY TURNS IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	22	19	31	21
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	29	23	45	5
10,000-19,999	20	18	21	9
20,000-39,999	26	18	35	4
40,000-79,999				2
80,000 OR MORE				1

TABLE 74

CURRENT SCRATCH RATE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	2.4	0.7	5.0	16
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	2.5	.3	6.3	4
10,000-19,999	5.0	.8	5.0	6
20,000-39,999				3
40,000-79,999				2
80,000 OR MORE				1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 75A

AVERAGE WHOLESALE REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
ALL WHOLESALE CENTERS	250	175	360	9
COMPANY SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS	-	-	-	-
31-100				3
101-250				2
OVER 250	281	140	395	4

TABLE 75B

AVERAGE RETAIL REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- DAIRY

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	132	106	160	10
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	-	-	-	-
10-30	-	-	-	-
31-100	-	-	-	-
101-250				2
251-500	141	89	156	4
OVER 500	116	106	209	4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 76

SHIFTS PER DAY, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DAIRY

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	22	10	12
SHIFTS PER DAY			
LESS THAN 1	4.5	10.0	-
ONE UP TO TWO	9.1	10.0	8.3
TWO UP TO THREE	63.6	60.0	66.7
THREE UP TO FOUR	22.7	20.0	25.0
FOUR OR MORE	-	-	-
ALL CENTERS	21	10	11
DAYS OF OPERATION PER WEEK			
LESS THAN FIVE	-	-	-
FIVE UP TO SIX	52.4	70.0	36.4
SIX UP TO SEVEN	42.9	30.0	54.5
SEVEN	4.8	-	9.1
ALL CENTERS	19	9	10
EMPLOYEES UNIONIZED			
YES	73.7	66.7	80.0
NO	26.3	33.3	20.0

TABLE 77

AVERAGE TOTAL AREA IN SQUARE FEET OF THE REFRIGERATED DISTRIBUTION CENTER/SECTION -- DELI

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	35,500	30,000	60,590	6
RETAIL CENTERS	30,500	16,215	67,000	4
WHOLESALE CENTERS				2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 78

AVERAGE NUMBER OF EMPLOYEES IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DELI

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	26	14	27	5

TABLE 79

AVERAGE NUMBER OF SUPERMARKETS SERVED PER REFRIGERATED DISTRIBUTION CENTER/SECTION -- DELI

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	156	119	300	6

TABLE 80

AVERAGE NUMBER OF CASES SHIPPED PER WEEK IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DELI

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	59,384	31,332	95,000	6

TABLE 81

AVERAGE NUMBER OF CASES SHIPPED PER TOTAL LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DELI

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	75	58	115	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 82

AVERAGE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DELI

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	177	150	220	6

TABLE 83

AVERAGE NUMBER OF INBOUND TRUCK LOADS PER WEEK -- REFRIGERATED DISTRIBUTION CENTER/SECTION -- DELI

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	64	25	179	6

TABLE 84

AVERAGE NUMBER OF ITEMS AVAILABLE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DELI

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	963	327	1663	6

TABLE 85

AVERAGE NUMBER OF INVENTORY TURNS IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DELI

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	25	19	41	5

TABLE 86

CURRENT SCRATCH RATE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- DELI

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	2.0	0.2	6.9	4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 87

AVERAGE TOTAL AREA IN SQUARE FEET OF THE REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	34,000	15,000	110,000	7
RETAIL CENTERS	34,000	15,200	110,000	5
WHOLESALE CENTERS				2

TABLE 88

AVERAGE NUMBER OF EMPLOYEES IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	8	4	71	7

TABLE 89

AVERAGE NUMBER OF SUPERMARKETS SERVED PER REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	26	21	75	7

TABLE 90

AVERAGE NUMBER OF CASES SHIPPED PER WEEK IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	71,500	6,500	135,000	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 91

AVERAGE NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	175	128	328	4

TABLE 92

AVERAGE NUMBER OF CASES SHIPPED PER TOTAL LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	90	75	105	6

TABLE 93

AVERAGE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	150	120	185	6

TABLE 94

AVERAGE NUMBER OF CASES STORED AND REPLENISHED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	285	280	295	5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 95

AVERAGE NUMBER OF OUTBOUND VEHICLE LOADS PER DAY IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	45.5	16.0	156.0	6

TABLE 96

AVERAGE NUMBER OF ITEMS AVAILABLE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	1000	320	1250	7

TABLE 97

AVERAGE NUMBER OF INVENTORY TURNS IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	35	15	47	5

TABLE 98

CURRENT SCRATCH RATE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	2.0	1.0	3.0	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 99

AVERAGE RETAIL REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- MEAT/DAIRY

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	183	156	390	5

TABLE 100

SHIFTS PER DAY, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT/DAIRY

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	7	5	2
SHIFTS PER DAY			
LESS THAN 1	-	-	
ONE UP TO TWO	14.3	20.0	
TWO UP TO THREE	42.9	40.0	
THREE UP TO FOUR	42.9	40.0	
FOUR OR MORE	-	-	
ALL CENTERS	6	5	
DAYS OF OPERATION PER WEEK			
LESS THAN FIVE	-	-	
FIVE UP TO SIX	50.0	40.0	
SIX UP TO SEVEN	33.3	40.0	
SEVEN	16.7	20.0	
ALL CENTERS	6	5	
EMPLOYEES UNIONIZED			
YES	83.3	80.0	
NO	16.7	20.0	

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 101

AVERAGE TOTAL AREA IN SQUARE FEET OF THE REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	49,000	24,390	90,000	17
RETAIL CENTERS	55,000	49,000	60,000	5
WHOLESALE CENTERS	40,372	16,031	116,250	12

TABLE 102

AVERAGE NUMBER OF EMPLOYEES IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	23	15	43	17
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999				3
20,000-39,999				3
40,000-79,999	31	17	70	4
80,000 OR MORE	43	27	50	6

TABLE 103

AVERAGE NUMBER OF SUPERMARKETS SERVED PER REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	80	60	177	15
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999				3
20,000-39,999				2
40,000-79,999	72	51	192	4
80,000 OR MORE	88	60	191	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 104

AVERAGE NUMBER OF CASES SHIPPED PER WEEK IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	46,563	21,335	73,750	16
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999				2
20,000-39,999				3
40,000-79,999	85,000	35,504	173,750	4
80,000 OR MORE	56,286	30,000	66,000	6

TABLE 105

AVERAGE NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	133	98	283	13
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999				1
20,000-39,999				3
40,000-79,999	265	152	436	4
80,000 OR MORE	106	70	180	5

TABLE 106

AVERAGE NUMBER OF CASES SHIPPED PER TOTAL LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	81	50	132	14
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999				2
20,000-39,999				3
40,000-79,999	119	92	153	4
80,000 OR MORE	82	50	200	5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 107

AVERAGE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	148	140	176	16
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999				2
20,000-39,999				3
40,000-79,999	184	158	204	4
80,000 OR MORE	151	140	165	6

TABLE 108

AVERAGE NUMBER OF CASES STORED AND REPLENISHED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	330	203	408	14
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999				2
20,000-39,999				3
40,000-79,999	363	234	1025	4
80,000 OR MORE	144	37	361	4

TABLE 109

AVERAGE NUMBER OF INBOUND TRUCK LOADS PER WEEK -- REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	77	35	125	16
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999				3
20,000-39,999				3
40,000-79,999	135	39	231	4
80,000 OR MORE	88	68	130	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 110

AVERAGE NUMBER OF OUTBOUND VEHICLE LOADS PER DAY IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	94.0	77.0	140.0	13
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999				1
20,000-39,999				2
40,000-79,999	120.0	82.8	173.8	4
80,000 OR MORE	111.5	75.0	140.0	6

TABLE 111

AVERAGE NUMBER OF ITEMS AVAILABLE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	1400	1300	2213	17
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999				3
20,000-39,999				3
40,000-79,999	2257	1603	2600	4
80,000 OR MORE	1873	1300	2207	6

TABLE 112

AVERAGE NUMBER OF INVENTORY TURNS IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	23	20	38	15
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999				3
20,000-39,999				2
40,000-79,999	44	26	69	4
80,000 OR MORE	23	22	32	5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 113

CURRENT SCRATCH RATE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	2.0	1.5	3.0	15
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999				2
20,000-39,999				3
40,000-79,999	1.3	.2	2.4	4
80,000 OR MORE	2.7	1.5	3.0	5

TABLE 114A

AVERAGE WHOLESALE REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
ALL WHOLESALE CENTERS	667	385	889	12
COMPANY SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS				1
31-100				3
101-250	500	283	754	4
OVER 250	864	418	1101	4

TABLE 114B

AVERAGE RETAIL REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- PRODUCE/DAIRY/MEAT

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	450	360	670	5
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	-	-	-	-
10-30	-	-	-	-
31-100	-	-	-	-
101-250				1
251-500				3
OVER 500				1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 15

SHIFTS PER DAY, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE/DAIRY/MEAT

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	17	5	12
SHIFTS PER DAY			
LESS THAN 1	-	-	-
ONE UP TO TWO	5.9	20.0	-
TWO UP TO THREE	58.8	80.0	50.0
THREE UP TO FOUR	35.3	-	50.0
FOUR OR MORE	-	-	-
ALL CENTERS	17	5	12
DAYS OF OPERATION PER WEEK			
LESS THAN FIVE	-	-	-
FIVE UP TO SIX	35.3	60.0	25.0
SIX UP TO SEVEN	47.1	20.0	58.3
SEVEN	17.6	20.0	16.7
ALL CENTERS	17	5	12
EMPLOYEES UNIONIZED			
YES	76.5	60.0	83.3
NO	23.5	40.0	16.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 116

AVERAGE TOTAL AREA IN SQUARE FEET OF THE REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	40,372	15,050	89,927	36
RETAIL CENTERS	49,000	10,000	71,800	19
WHOLESALE CENTERS	39,721	24,390	90,000	17

TABLE 117

AVERAGE NUMBER OF EMPLOYEES IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	23	7	49	36
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	4	4	4	5
10,000-19,999	7	4	12	6
20,000-39,999	17	11	37	7
40,000-79,999	34	25	76	8
80,000 OR MORE	58	39	71	10

TABLE 118

AVERAGE NUMBER OF SUPERMARKETS SERVED PER REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	65	43	117	34
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	31	12	36	4
10,000-19,999	59	24	75	6
20,000-39,999	67	43	128	6
40,000-79,999	64	51	173	8
80,000 OR MORE	100	75	119	10

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 119

AVERAGE NUMBER OF CASES SHIPPED PER WEEK IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	52,764	17,000	95,000	34
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	6,750	5,375	8,133	4
10,000-19,999	17,000	13,000	20,000	5
20,000-39,999	49,798	21,000	70,000	7
40,000-79,999	92,500	71,025	161,000	8
80,000 OR MORE	91,000	51,000	174,000	10

TABLE 120

AVERAGE NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	165	106	320	21
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999				3
20,000-39,999	157	102	384	6
40,000-79,999	320	210	353	5
80,000 OR MORE	111	70	180	6

TABLE 121

AVERAGE NUMBER OF CASES SHIPPED PER TOTAL LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	81	55	110	26
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				2
10,000-19,999	77	65	88	4
20,000-39,999	55	47	105	7
40,000-79,999	105	88	132	5
80,000 OR MORE	79	50	183	8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE [illegible]22

AVERAGE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	148	125	182	28
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	115	70	213	4
10,000-19,999	142	124	175	4
20,000-39,999	145	105	168	7
40,000-79,999	185	182	205	5
80,000 OR MORE	143	125	163	8

TABLE 123

AVERAGE NUMBER OF CASES STORED AND REPLENISHED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	315	230	408	27
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000-19,999	295	209	411	4
20,000-39,999	359	325	450	6
40,000-79,999	320	260	400	6
80,000 OR MORE	255	105	394	8

TABLE 124

AVERAGE NUMBER OF INBOUND TRUCK LOADS PER WEEK -- REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	79	20	152	35
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	8	5	18	4
10,000-19,999	20	14	35	6
20,000-39,999	79	45	86	7
40,000-79,999	174	123	249	8
80,000 OR MORE	133	75	150	10

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 125

AVERAGE NUMBER OF OUTBOUND VEHICLE LOADS PER DAY IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	91.0	30.0	140.0	30
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	11.1	4.6	33.3	4
10,000-19,999				2
20,000-39,999	52.5	20.0	80.0	6
40,000-79,999	103.5	91.3	173.8	8
80,000 OR MORE	145.0	94.0	162.0	10

TABLE 126

AVERAGE NUMBER OF ITEMS AVAILABLE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	1350	840	2207	35
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	335	163	463	4
10,000-19,999	820	730	850	6
20,000-39,999	1316	1000	1450	7
40,000-79,999	2082	1675	2600	8
80,000 OR MORE	1873	1300	3100	10

TABLE 127

AVERAGE NUMBER OF INVENTORY TURNS IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	35	22	45	29
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				3
10,000-19,999	21	16	47	6
20,000-39,999	23	9	49	4
40,000-79,999	45	39	57	8
80,000 OR MORE	34	22	40	8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 128
CURRENT SCRATCH RATE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	2.0	1.1	3.0	28
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				2
10,000-19,999	3.0	3.0	3.7	5
20,000-39,999	1.8	.2	2.0	5
40,000-79,999	1.8	.5	2.9	8
80,000 OR MORE	1.8	1.1	2.9	8

TABLE 129A
AVERAGE WHOLESALE REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
ALL WHOLESALE CENTERS	678	385	889	16
COMPANY SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS				1
31-100	390	294	1675	4
101-250	528	500	800	6
OVER 250	895	833	1015	5

TABLE 129B
AVERAGE RETAIL REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- MEAT COMBINATION

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	310	89	617	19
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10				3
10-30	-	-	-	-
31-100				2
101-250	129	55	176	4
251-500	405	144	615	4
OVER 500	504	256	675	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 130

SHIFTS PER DAY, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- MEAT COMBINATION

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	36	19	17
SHIFTS PER DAY			
LESS THAN 1	2.8	5.3	-
ONE UP TO TWO	5.6	10.5	-
TWO UP TO THREE	55.6	57.9	52.9
THREE UP TO FOUR	36.1	26.3	47.1
FOUR OR MORE	-	-	-
ALL CENTERS	35	19	16
DAYS OF OPERATION PER WEEK			
LESS THAN FIVE	-	-	-
FIVE UP TO SIX	42.9	52.6	31.3
SIX UP TO SEVEN	45.7	36.8	56.3
SEVEN	11.4	10.5	12.5
ALL CENTERS	34	19	15
EMPLOYEES UNIONIZED			
YES	73.5	63.2	86.7
NO	26.5	36.8	13.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 131
AVERAGE TOTAL AREA IN SQUARE FEET OF THE REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	49,000	32,610	89,708	29
RETAIL CENTERS	61,250	38,650	70,100	12
WHOLESALE CENTERS	39,721	24,390	90,000	17

TABLE 132
AVERAGE NUMBER OF EMPLOYEES IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	30	15	47	29
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				2
10,000-19,999	11	6	17	4
20,000-39,999	29	15	37	6
40,000-79,999	38	30	63	9
80,000 OR MORE	49	30	70	8

TABLE 133
AVERAGE NUMBER OF SUPERMARKETS SERVED PER REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	75	58	128	27
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999	75	64	152	4
20,000-39,999	75	74	128	5
40,000-79,999	61	52	92	9
80,000 OR MORE	100	65	173	8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 134

AVERAGE NUMBER OF CASES SHIPPED PER WEEK IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	63,786	22,085	95,000	28
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				2
10,000-19,999				3
20,000-39,999	42,614	22,000	70,000	6
40,000-79,999	95,000	75,000	120,000	9
80,000 OR MORE	63,786	35,250	167,750	8

TABLE 135

AVERAGE NUMBER OF CASES SHIPPED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	127	70	283	18
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000	-	-	-	-
10,000-19,999				2
20,000-39,999	102	55	149	5
40,000-79,999	265	133	353	6
80,000 OR MORE	106	70	180	5

TABLE 136

AVERAGE NUMBER OF CASES SHIPPED PER TOTAL LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	75	50	110	22
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999				3
20,000-39,999	49	47	56	6
40,000-79,999	97	75	132	6
80,000 OR MORE	108	50	200	6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 137

AVERAGE NUMBER OF CASES SELECTED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	145	118	180	23
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				2
10,000-19,999				3
20,000-39,999	140	100	145	6
40,000-79,999	184	165	205	6
80,000 OR MORE	151	140	165	6

TABLE 138

AVERAGE NUMBER OF CASES STORED AND REPLENISHED PER DIRECT LABOR HOUR IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	325	203	408	23
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				2
10,000-19,999				3
20,000-39,999	334	325	384	5
40,000-79,999	315	205	400	7
80,000 OR MORE	285	67	408	6

TABLE 139

AVERAGE NUMBER OF INBOUND TRUCK LOADS PER WEEK -- REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	105	41	170	28
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999	20	14	44	4
20,000-39,999	82	45	110	6
40,000-79,999	173	140	230	9
80,000 OR MORE	115	70	221	8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 140

AVERAGE NUMBER OF OUTBOUND VEHICLE LOADS PER DAY IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	95.0	77.0	140.0	25
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999				2
20,000-39,999	80.0	55.0	92.0	5
40,000-79,999	107.0	95.0	140.0	9
80,000 OR MORE	134.5	79.8	159.8	8

TABLE 141

AVERAGE NUMBER OF ITEMS AVAILABLE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	1597	1300	2213	29
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				2
10,000-19,999	1090	810	1385	4
20,000-39,999	1400	1316	1597	6
40,000-79,999	1950	1600	2300	9
80,000 OR MORE	2146	1390	3325	8

TABLE 142

AVERAGE NUMBER OF INVENTORY TURNS IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	36	22	45	25
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				2
10,000-19,999	25	17	46	4
20,000-39,999	32	19	36	4
40,000-79,999	45	39	57	8
80,000 OR MORE	32	22	40	7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 143

CURRENT SCRATCH RATE IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
TOTAL CENTERS	2.0	1.5	3.0	25
SIZE OF DISTRIBUTION CENTER/SECTION				
LESS THAN 10,000				1
10,000-19,999				3
20,000-39,999	1.8	1.0	2.0	5
40,000-79,999	2.0	.5	3.0	9
80,000 OR MORE	2.0	1.5	3.0	7

TABLE 144A

AVERAGE WHOLESALE REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
ALL WHOLESALE CENTERS	556	380	870	17
COMPANY SALES (IN MILLIONS OF DOLLARS)				
30 OR LESS				1
31-100	380	200	400	5
101-250	528	500	800	6
OVER 250	895	833	1015	5

TABLE 144B

AVERAGE RETAIL REFRIGERATED DISTRIBUTION CENTER/SECTION NUMBER OF ORDERS PROCESSED WEEKLY -- PRODUCE COMBINATION

	MEDIAN	MIDDLE RANGE		N=
ALL RETAIL CENTERS	375	270	615	12
COMPANY SALES (IN MILLIONS OF DOLLARS)				
UNDER 10				3
10-30	-	-	-	-
31-100	-	-	-	-
101-250				1
251-500	405	345	615	4
OVER 500	327	118	1074	4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 145

SHIFTS PER DAY, DAYS PER WEEK OF OPERATION, AND UNIONIZATION IN REFRIGERATED DISTRIBUTION CENTER/SECTION -- PRODUCE COMBINATION

	ALL CENTERS	ALL RETAIL CENTERS	ALL WHOLESALE CENTERS
ALL CENTERS	29	12	17
SHIFTS PER DAY			
LESS THAN 1	-	-	-
ONE UP TO TWO	3.4	8.3	-
TWO UP TO THREE	65.5	75.0	58.8
THREE UP TO FOUR	31.0	16.7	41.2
FOUR OR MORE	-	-	-
ALL CENTERS	29	12	17
DAYS OF OPERATION PER WEEK			
LESS THAN FIVE	-	-	-
FIVE UP TO SIX	34.5	41.7	29.4
SIX UP TO SEVEN	51.7	41.7	58.8
SEVEN	13.8	16.7	11.8
ALL CENTERS	27	12	15
EMPLOYEES UNIONIZED			
YES	70.4	58.3	80.0
NO	29.6	41.7	20.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 148

GEOGRAPHIC REGION OF RETAILERS HEADQUARTERS

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	223	67	156	80	51	30	22	21	19
NORTHEAST	9.0	7.5	9.6	10.0	9.8	6.7	9.1	-	15.8
MIDDLE ATLANTIC	10.3	14.9	8.3	6.3	11.8	10.0	4.5	23.8	15.8
EAST NORTH CENTRAL	25.6	25.4	25.6	30.0	23.5	23.3	31.8	19.0	15.8
WEST NORTH CENTRAL	9.4	7.5	10.3	13.7	3.9	6.7	4.5	14.3	10.5
SOUTHEAST	17.9	16.4	18.6	17.5	19.6	23.3	13.6	19.0	10.5
WEST SOUTH CENTRAL	8.5	6.0	9.6	7.5	13.7	3.3	9.1	4.8	10.5
MOUNTAIN	3.6	6.0	2.6	2.5	2.0	-	9.1	9.5	5.3
PACIFIC	13.5	11.9	14.1	12.5	11.8	26.7	18.2	-	10.5
CANADA	2.2	4.5	1.3	-	3.9	-	-	9.5	5.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 147

AVERAGE PERCENTAGE OF OPERATIONS SUPPLIED BY OUTSIDE WHOLESALERS AND DIRECT VENDOR DELIVERIES

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	100	60	100	213
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	100	100	100	78
10 - 30 MILLION	100	100	100	49
31 - 100 MILLION	100	93	100	28
101 - 250 MILLION	75	30	100	21
251 - 500 MILLION	38	30	60	21
OVER 500 MILLION	23	18	50	16
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	100	100	100	19
MIDDLE ATLANTIC	90	40	100	21
EAST NORTH CENTRAL	100	35	100	55
WEST NORTH CENTRAL	100	100	100	20
SOUTHEAST	100	55	100	38
WEST SOUTH CENTRAL	100	100	100	18
MOUNTAIN	81	25	100	8
PACIFIC	100	100	100	29
CANADA	55	45	100	5
RETAIL AFFILIATION				
CHAIN	40	25	90	63
INDEPENDENT	100	100	100	150

TABLE 148

NUMBER OF SUPERMARKETS COMPANY OPERATES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	223	20	23	57	21	40	19	8	30	5
1	31.4	40.0	30.4	33.3	42.9	37.5	21.1	12.5	23.3	-
2-10	38.6	35.0	26.1	36.8	33.3	35.0	57.9	37.5	50.0	40.0
11-49	18.4	15.0	17.4	21.1	9.5	17.5	10.5	25.0	23.3	40.0
50 AND OVER	11.7	10.0	26.1	8.8	14.3	10.0	10.5	25.0	3.3	20.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 149A

PERCENTAGE OF OPERATION SUPPLIED BY

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	213	19	21	55	20	38	18	8	29	5
OWN WAREHOUSE	50.8	68.1	62.4	76.5	9.8	59.9	55.2	44.7	8.7	64.6
DIRECT VENDOR DELIVERIES	26.5	22.3	19.0	19.5	30.9	32.5	27.1	32.6	33.0	33.5
VOLUNTARY WHOLESALER	11.0	.6	1.4	2.4	55.9	2.0	8.5	.7	5.9	.0
COOPERATIVE WHOLESALER	7.5	.6	8.9	1.2	.3	4.8	3.6	4.7	50.1	.8
UNAFFILIATED WHOLESALER	4.2	8.4	8.3	.4	3.1	.9	5.6	17.2	2.5	1.2

TABLE 149B

PERCENTAGE OF OPERATION SUPPLIED BY

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	213	63	150	78	49	28	21	21	16
OWN WAREHOUSE	50.8	56.6	4.6	5.7	8.9	8.4	32.5	55.4	54.3
DIRECT VENDOR DELIVERIES	26.5	25.7	33.3	29.4	29.7	32.4	28.3	27.0	26.0
VOLUNTARY WHOLESALER	11.0	11.3	8.5	27.6	27.9	23.0	10.6	2.1	11.8
COOPERATIVE WHOLESALER	7.5	2.6	46.5	26.7	15.4	21.3	18.3	7.9	5.7
UNAFFILIATED WHOLESALER	4.2	3.8	7.0	10.5	18.1	14.8	10.1	7.5	2.3

NOTE: DATA WEIGHTED BY 1983 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 150

RETAIL SALES IN 1983

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	223	20	23	57	21	40	19	8	30	5
UNDER 10 MILLION	35.9	40.0	21.7	42.1	52.4	35.0	31.6	25.0	33.3	-
10 - 30 MILLION	22.9	25.0	26.1	21.1	9.5	25.0	36.8	12.5	20.0	40.0
31 - 100 MILLION	13.5	10.0	13.0	12.3	9.5	17.5	5.3	-	26.7	-
101 - 250 MILLION	9.9	10.0	4.3	12.3	4.8	7.5	10.5	25.0	13.3	-
251 - 500 MILLION	9.4	-	21.7	7.0	14.3	10.0	5.3	25.0	-	40.0
OVER 500 MILLION	8.5	15.0	13.0	5.3	9.5	5.0	10.5	12.5	6.7	20.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 151A

AVERAGE PERCENT CHANGE IN RETAIL SALES 1982 VS. 1983

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	7.6	1.2	14.3	214
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	5.9	.0	13.2	77
10 - 30 MILLION	8.3	1.2	19.4	48
31 - 100 MILLION	10.0	4.0	14.3	27
101 - 250 MILLION	10.1	2.4	20.0	22
251 - 500 MILLION	4.3	.0	10.8	21
OVER 500 MILLION	9.6	6.5	11.9	19

TABLE 151B

AVERAGE PERCENT CHANGE IN RETAIL SALES 1982 VS. 1983

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	7.6	1.2	14.3	214
REGION - CHAIN STORES				
NORTHEAST	9.6	9.4	10.2	5
MIDDLE ATLANTIC	9.0	3.3	13.6	10
EAST NORTH CENTRAL	6.5	-3.4	12.2	17
WEST NORTH CENTRAL	6.9	.0	11.2	5
SOUTHEAST	12.0	9.5	19.0	11
WEST SOUTH CENTRAL	9.4	4.7	15.9	4
MOUNTAIN	8.1	-.1	20.8	4
PACIFIC	10.7	4.0	29.7	7
CANADA				3
REGION - INDEPENDENT STORES				
NORTHEAST	2.6	.0	11.1	14
MIDDLE ATLANTIC	8.2	3.0	21.7	12
EAST NORTH CENTRAL	6.2	1.2	13.2	38
WEST NORTH CENTRAL	5.7	.0	11.8	15
SOUTHEAST	7.1	.0	12.9	27
WEST SOUTH CENTRAL	.0	-3.4	12.1	15
MOUNTAIN	71.8	-5.3	158.2	4
PACIFIC	7.8	5.2	14.3	21
CANADA				2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 152A

AVERAGE PERCENT CHANGE IN RETAIL SALES IDENTICAL STORES 1982 VS. 1983

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	6.1	1.2	11.1	169
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	5.7	.0	13.0	45
10 - 30 MILLION	8.1	1.8	14.0	40
31 - 100 MILLION	6.9	2.2	12.9	27
101 - 250 MILLION	5.8	1.1	12.5	20
251 - 500 MILLION	4.3	.1	10.3	20
OVER 500 MILLION	5.6	1.1	7.8	17

TABLE 152B

AVERAGE PERCENT CHANGE IN RETAIL SALES IDENTICAL STORES 1982 VS. 1983

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	6.1	1.2	11.1	169
REGION - CHAIN STORES				
NORTHEAST	5.3	4.2	7.8	5
MIDDLE ATLANTIC	3.6	1.1	10.5	9
EAST NORTH CENTRAL	2.9	-1.4	9.3	17
WEST NORTH CENTRAL	5.2	1.1	12.5	4
SOUTHEAST	10.7	2.5	14.3	11
WEST SOUTH CENTRAL	5.4	2.8	20.2	4
MOUNTAIN	5.8	-1.0	11.9	4
PACIFIC	6.7	1.7	20.0	6
CANADA				3
REGION - INDEPENDENT STORES				
NORTHEAST	7.7	-4.0	15.0	11
MIDDLE ATLANTIC	6.3	3.3	17.3	8
EAST NORTH CENTRAL	5.0	.0	13.0	26
WEST NORTH CENTRAL	5.7	.0	11.1	9
SOUTHEAST	7.1	1.6	12.5	20
WEST SOUTH CENTRAL	5.9	.0	7.7	13
MOUNTAIN				2
PACIFIC	10.3	5.9	15.5	15
CANADA				2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 153
AVERAGE WEEKLY SALES PER SUPERMARKET IN 1983

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	153,600	117,000	195,000	7023
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	76,500	60,000	100,000	107
10 - 30 MILLION	96,154	70,604	138,523	156
31 - 100 MILLION	123,626	87,591	157,000	235
101 - 250 MILLION	136,523	106,000	207,148	364
251 - 500 MILLION	144,000	114,116	180,639	984
OVER 500 MILLION	177,613	117,000	194,900	5177
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	229,960	147,826	230,000	286
MIDDLE ATLANTIC	73,784	73,784	129,438	1477
EAST NORTH CENTRAL	177,613	170,556	177,613	1819
WEST NORTH CENTRAL	117,300	116,700	117,950	1393
SOUTHEAST	197,964	125,000	200,000	778
WEST SOUTH CENTRAL	206,100	206,000	212,260	297
MOUNTAIN	194,900	194,500	195,250	530
PACIFIC	136,523	110,000	170,000	217
CANADA	183,800	183,800	183,800	226
RETAIL AFFILIATION				
CHAIN	160,000	117,000	194,988	6610
INDEPENDENT	102,306	70,604	159,615	413

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 154
TRENDS IN SALES DISTRIBUTION

	PERCENT OF STORE SALES IN:		
	Grocery	Meat	Produce
1976	67.9%	21.0%	7.0%
1977	68.0	20.2	7.0
1978	66.9	20.6	7.1
1979	70.5	22.1	6.9
1980	71.0	21.5	7.2
1981	70.9	21.3	7.6
1982	71.8	20.7	7.4
1983	72.0	20.2	7.9

Source: Operations Review 1976-1983

TABLE 155A

PROFILE BY STORE TYPE -- NUMBER OF STORES RESPONDING TO EACH ITEM

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
AVERAGE WEEKLY SALES	4424	1378	748	214
AVERAGE WEEKLY SALES/CHECKOUT	2082	434	226	131
AVERAGE SALE/ CUSTOMER TRANSACTION	2617	1217	558	149
SALES/LABOR HOUR	2326	334	191	136
AVERAGE WEEKLY SALES/SQUARE FOOT OF SELLING AREA	4347	1317	735	207
AVERAGE TOTAL SIZE/SQUARE FEET	4422	1381	746	217
AVERAGE RETAIL PRICE/ITEM	1514	391	162	99
AVERAGE NUMBER OF ITEMS CARRIED	2111	480	258	124

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 155B

PROFILE BY STORE TYPE -- MEDIANS

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
AVERAGE WEEKLY SALES	100,000	186,200	291,230	202,330
AVERAGE WEEKLY SALES/CHECKOUT	19,200	26,850	27,400	23,100
AVERAGE SALE/ CUSTOMER TRANSACTION	14.02	16.61	17.40	22.15
SALES/LABOR HOUR	88.20	91.00	87.00	130.80
AVERAGE WEEKLY SALES/SQUARE FOOT OF SELLING AREA	7.15	6.15	6.85	8.00
AVERAGE TOTAL SIZE/SQUARE FEET	17,235	30,200	45,875	28,700
AVERAGE RETAIL PRICE/ITEM	1.27	1.25	1.55	1.18
AVERAGE NUMBER OF ITEMS CARRIED	12,500	18,000	25,000	9,000

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 156A
AVERAGE WEEKLY SALES PER SQUARE FOOT OF SELLING AREA

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	6.95	5.54	8.35	6916
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	6.76	5.13	9.75	100
10 - 30 MILLION	6.80	4.97	8.96	137
31 - 100 MILLION	5.83	4.61	7.55	236
101 - 250 MILLION	7.41	5.93	12.51	336
251 - 500 MILLION	7.63	6.30	8.90	984
OVER 500 MILLION	6.90	5.50	8.43	5123

TABLE 156B
AVERAGE WEEKLY SALES PER SQUARE FOOT OF SELLING AREA

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	6.95	5.54	8.35	6916
REGION - CHAIN STORES				
NORTHEAST	9.91	9.91	11.16	255
MIDDLE ATLANTIC	4.62	4.62	7.63	1434
EAST NORTH CENTRAL	5.50	5.49	6.30	1711
WEST NORTH CENTRAL	6.95	6.09	7.00	1355
SOUTHEAST	6.39	6.39	9.34	692
WEST SOUTH CENTRAL	8.85	8.80	8.90	241
MOUNTAIN	8.35	8.30	8.41	517
PACIFIC	5.50	5.36	6.94	113
CANADA	10.40	10.35	10.40	221
REGION - INDEPENDENT STORES				
NORTHEAST	9.75	7.34	17.00	23
MIDDLE ATLANTIC	11.00	5.16	14.40	26
EAST NORTH CENTRAL	6.66	3.74	9.54	85
WEST NORTH CENTRAL	8.46	7.00	8.95	32
SOUTHEAST	5.83	4.97	7.17	83
WEST SOUTH CENTRAL	5.49	4.61	7.05	56
MOUNTAIN	16.08	11.11	16.08	8
PACIFIC	9.91	5.77	14.40	59
CANADA	9.23	3.29	9.23	5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 157A

AVERAGE SALE PER CUSTOMER TRANSACTION

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	14.60	12.94	15.74	5780
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	11.40	10.00	13.30	93
10 - 30 MILLION	12.83	10.72	15.01	142
31 - 100 MILLION	13.39	11.22	15.62	240
101 - 250 MILLION	14.00	13.25	16.95	353
251 - 500 MILLION	15.34	13.45	16.37	929
OVER 500 MILLION	15.00	12.30	15.80	4023

TABLE 157B

AVERAGE SALE PER CUSTOMER TRANSACTION

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	14.60	12.94	15.74	5780
REGION - CHAIN STORES				
NORTHEAST	17.08	16.70	17.08	253
MIDDLE ATLANTIC	11.99	11.99	11.99	1379
EAST NORTH CENTRAL	15.75	15.70	15.85	1733
WEST NORTH CENTRAL	14.92	12.94	17.91	201
SOUTHEAST	14.57	14.50	15.00	692
WEST SOUTH CENTRAL	13.11	13.00	15.00	241
MOUNTAIN	13.50	13.45	13.60	517
PACIFIC	12.30	10.58	13.25	156
CANADA	18.57	16.70	18.60	221
REGION - INDEPENDENT STORES				
NORTHEAST	14.50	12.53	16.12	31
MIDDLE ATLANTIC	16.48	14.73	17.50	25
EAST NORTH CENTRAL	12.83	10.50	14.50	85
WEST NORTH CENTRAL	12.02	10.72	19.00	36
SOUTHEAST	13.58	12.50	16.58	81
WEST SOUTH CENTRAL	12.80	10.55	13.81	52
MOUNTAIN	18.70	12.23	18.77	8
PACIFIC	13.01	11.00	13.52	62
CANADA	18.55	18.50	30.74	5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 158

AVERAGE WEEKLY SALES PER CHECKOUT

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	19,425	19,341	23,030	4498
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	15,000	13,000	17,551	100
10 - 30 MILLION	14,121	11,513	18,004	145
31 - 100 MILLION	17,660	13,369	20,600	240
101 - 250 MILLION	19,520	17,000	24,899	310
251 - 500 MILLION	18,340	15,800	20,750	764
OVER 500 MILLION	19,732	19,425	24,770	2939
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	22,996	19,732	22,996	271
MIDDLE ATLANTIC	25,060	20,000	31,907	347
EAST NORTH CENTRAL	19,425	19,400	19,470	1819
WEST NORTH CENTRAL	18,340	15,385	21,115	233
SOUTHEAST	21,996	15,000	22,000	698
WEST SOUTH CENTRAL	23,025	23,000	23,500	225
MOUNTAIN	24,700	24,600	25,090	525
PACIFIC	17,750	13,369	19,230	154
CANADA	15,380	15,300	17,000	226
RETAIL AFFILIATION				
CHAIN	19,425	19,400	23,031	4109
INDEPENDENT	16,889	12,888	21,200	389

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 159A

AVERAGE SALES PER LABOR HOUR FOR STORE EMPLOYEES

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	91.00	88.00	94.81	5537
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	74.39	65.54	83.88	81
10 - 30 MILLION	70.46	66.50	90.41	117
31 - 100 MILLION	90.00	75.42	112.00	241
101 - 250 MILLION	92.34	83.63	132.25	331
251 - 500 MILLION	93.26	85.05	104.00	932
OVER 500 MILLION	93.42	87.90	93.50	3835

TABLE 159B

AVERAGE SALES PER LABOR HOUR FOR STORE EMPLOYEES

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	91.00	88.00	94.81	5537
REGION - CHAIN STORES				
NORTHEAST	96.30	91.81	100.00	255
MIDDLE ATLANTIC	93.42	93.42	93.42	1434
EAST NORTH CENTRAL	88.12	87.80	88.75	1713
WEST NORTH CENTRAL	90.42	82.62	90.50	201
SOUTHEAST	79.89	77.00	79.95	530
WEST SOUTH CENTRAL	80.90	80.90	80.90	241
MOUNTAIN	94.80	94.73	95.00	517
PACIFIC	132.25	112.00	135.00	100
CANADA	124.30	124.30	124.30	197
REGION - INDEPENDENT STORES				
NORTHEAST	82.50	75.42	90.50	21
MIDDLE ATLANTIC	90.85	71.83	103.25	25
EAST NORTH CENTRAL	70.50	61.00	79.43	72
WEST NORTH CENTRAL	82.68	64.25	160.00	35
SOUTHEAST	73.15	70.00	78.07	72
WEST SOUTH CENTRAL	76.47	66.42	88.64	52
MOUNTAIN	78.50	56.15	78.50	8
PACIFIC	105.00	94.22	115.00	59
CANADA	86.19	86.19	134.22	5

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 160

SALES PER LABOR HOUR AND HOURLY WAGE RATES

(Current & Historical)

	GENERAL DEPT.		GROCERY		MEAT		PRODUCE	
	Sales/ Labor Hr.	Avg. Hrly. Wage Rate	Sales/ Labor Hr.	Avg. Hrly. Wage Rate	Sales/ Labor Hr.	Avg. Hrly. Wage Rate	Sales/ Labor Hr.	Avg. Hrly. Wage Rate
1976	$124.90	$4.23	$147.68	$4.20	$69.93	$5.53	$53.59	$4.54
1977	145.61	4.41	151.91	5.06	77.47	6.32	57.64	5.22
1978	153.51	5.03	163.17	5.48	86.58	6.91	62.97	6.00
1979	173.92	5.19	151.36	6.26	89.93	7.93	67.80	6.75
1980	179.13	5.59	154.39	6.69	91.58	8.13	71.90	6.91
1981	205.38	6.22	174.97	7.53	97.36	9.81	77.12	8.07
1982	204.86	6.31	184.82	7.63	92.72	9.33	75.58	8.00
1983	226.46	6.48	194.10	8.14	99.50	10.57	89.66	9.00

Source: Operations Review 1976-1983

RETAIL OPERATIONS

TABLE 161

STORE DEVELOPMENT

	All Stores
Total	7,450
New Supermarkets Built	3.7%
Supermarkets that Underwent Remodeling	6.3%
Supermarkets Closed	4.3%

TABLE 182

TOTAL SIZE OF TYPICAL SUPERMARKET

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	28,000	22,000	32,063	7043
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	15,000	12,000	16,400	101
10 - 30 MILLION	17,000	12,250	20,150	156
31 - 100 MILLION	20,900	16,000	28,432	261
101 - 250 MILLION	26,500	18,000	31,982	364
251 - 500 MILLION	25,000	22,000	28,188	984
OVER 500 MILLION	30,300	22,000	32,063	5177
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	27,750	27,720	30,300	284
MIDDLE ATLANTIC	15,959	15,959	20,500	1478
EAST NORTH CENTRAL	32,063	30,000	32,063	1818
WEST NORTH CENTRAL	21,980	21,800	22,000	1392
SOUTHEAST	34,000	24,560	36,000	784
WEST SOUTH CENTRAL	29,820	29,730	30,000	297
MOUNTAIN	30,980	30,700	31,000	530
PACIFIC	25,000	20,000	35,000	234
CANADA	34,850	34,700	35,000	226
RETAIL AFFILIATION				
CHAIN	27,800	22,000	32,063	6630
INDEPENDENT	18,000	14,000	26,000	413

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 163A

AVERAGE NUMBER OF ITEMS CARRIED BY A TYPICAL SUPERMARKET

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5572	261	438	1776	1343	701	217	530	228	78
NUMBER OF ITEMS	16,719	12,661	16,642	19,205	15,056	15,713	27,903	12,545	15,957	11,263

TABLE 163B

AVERAGE NUMBER OF ITEMS CARRIED BY A TYPICAL SUPERMARKET

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5572	5253	319	66	118	228	297	865	3998
NUMBER OF ITEMS	16,719	16,849	14,574	10,936	12,953	15,015	16,293	13,565	17,737

TABLE 164A

AVERAGE PRICE OF EACH ITEM CARRIED BY A TYPICAL SUPERMARKET

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	3496	253	416	1622	126	339	30	524	111	75
PRICE OF ITEMS	1.28	1.16	1.18	1.28	1.27	1.22	1.31	1.40	1.26	1.59

TABLE 164B

AVERAGE PRICE OF EACH ITEM CARRIED BY A TYPICAL SUPERMARKET

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	3496	3301	195	35	67	135	206	686	2367
PRICE OF ITEMS	1.28	1.28	1.27	1.29	1.21	1.23	1.22	1.26	1.29

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 185A
CREDIT CARDS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	5881	286	1475	1808	238	780	282	550	236	226
ACCEPT CREDIT CARDS FOR GROCERY ITEMS	8.3	1.0	.2	16.8	9.7	.8	.0	21.8	2.5	10.6
TOTAL	5867	282	1475	1806	237	773	282	550	236	226
ACCEPT CREDIT CARDS FOR PHARMACEUTICAL ITEMS AND/OR NON-FOODS	17.4	19.5	8.1	19.1	26.6	12.5	29.1	20.7	50.4	12.8

TABLE 185B
CREDIT CARDS

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	5881	5485	396	100	141	260	353	1004	4023
ACCEPT CREDIT CARDS FOR GROCERY ITEMS	8.3	8.4	6.8	17.0	5.7	4.2	10.2	4.9	9.1
TOTAL	5867	5485	382	96	131	260	353	1004	4023
ACCEPT CREDIT CARDS FOR PHARMACEUTICAL ITEMS AND/OR NON-FOODS	17.4	17.8	11.8	16.7	16.0	1.2	25.8	16.3	18.1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 166A

PERCENTAGE OF SALES ACCOUNTED FOR BY GENERAL MERCHANDISE

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	3.9	1.3	5.1	164
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	2.0	1.0	4.0	62
10 - 30 MILLION	2.7	1.6	5.4	33
31 - 100 MILLION	2.5	1.6	3.5	23
101 - 250 MILLION	5.2	2.7	12.6	14
251 - 500 MILLION	3.5	3.0	6.0	17
OVER 500 MILLION	4.0	1.3	5.0	15
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	3.0	3.0	3.0	12
MIDDLE ATLANTIC	5.1	4.0	5.1	17
EAST NORTH CENTRAL	1.3	1.3	1.3	46
WEST NORTH CENTRAL	4.0	4.0	4.0	16
SOUTHEAST	3.0	2.5	5.0	25
WEST SOUTH CENTRAL	7.7	7.7	14.8	15
MOUNTAIN	9.0	9.0	9.0	6
PACIFIC	4.0	2.1	12.6	25
CANADA				2
RETAIL AFFILIATION				
CHAIN	4.0	1.3	5.1	50
INDEPENDENT	2.7	2.0	6.0	114

NOTE: DATA WEIGHTED BY 1983 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 1068

PERCENTAGE OF SALES ACCOUNTED FOR BY TOBACCO

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	2.5	1.1	3.0	130
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	3.0	1.5	5.0	53
10 - 30 MILLION	3.0	1.0	5.0	23
31 - 100 MILLION	2.0	1.0	3.4	20
101 - 250 MILLION	2.1	2.0	4.8	13
251 - 500 MILLION	2.5	1.0	4.3	11
OVER 500 MILLION	2.6	1.7	2.9	10
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	1.7	1.0	1.7	10
MIDDLE ATLANTIC	1.0	1.0	2.3	14
EAST NORTH CENTRAL	3.6	2.5	3.6	35
WEST NORTH CENTRAL	2.6	2.6	4.5	13
SOUTHEAST	2.0	2.0	2.1	22
WEST SOUTH CENTRAL	.5	.5	3.0	10
MOUNTAIN				3
PACIFIC	2.1	2.0	3.4	21
CANADA				2
RETAIL AFFILIATION				
CHAIN	2.5	1.0	2.9	37
INDEPENDENT	3.0	1.1	4.0	93

NOTE: DATA WEIGHTED BY 1983 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 108C

PERCENTAGE OF SALES ACCOUNTED FOR BY HABA

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	3.8	2.9	6.0	157
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	3.0	2.0	4.0	62
10 - 30 MILLION	2.5	2.0	4.1	29
31 - 100 MILLION	3.0	2.0	3.5	23
101 - 250 MILLION	4.0	2.8	7.0	13
251 - 500 MILLION	3.0	2.4	3.5	16
OVER 500 MILLION	4.5	2.9	7.0	14
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	4.5	2.0	4.5	12
MIDDLE ATLANTIC	7.2	4.8	7.2	17
EAST NORTH CENTRAL	2.9	2.9	2.9	43
WEST NORTH CENTRAL	6.0	6.0	6.0	17
SOUTHEAST	3.0	3.0	10.0	24
WEST SOUTH CENTRAL	7.1	7.0	7.1	12
MOUNTAIN	7.0	7.0	7.0	6
PACIFIC	4.5	3.2	5.0	24
CANADA				2
RETAIL AFFILIATION				
CHAIN	4.0	2.9	6.0	47
INDEPENDENT	3.0	2.0	4.8	110

NOTE: DATA WEIGHTED BY 1983 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 167A

SPECIALTY DEPARTMENTS AND SERVICES OFFERED BY SUPERMARKETS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	6093	286	505	1820	1393	780	297	550	236	226
BEER	73.0	49.7	52.3	80.4	80.2	66.9	72.7	92.0	91.9	.0
SCRATCH AND/OR BAKE-OFF BAKERY	55.9	49.7	50.5	71.2	46.6	46.7	55.9	65.3	26.3	49.6
WINE	54.8	35.7	3.0	79.8	30.8	60.3	65.3	83.1	91.9	.0
DELI WITH CARRY OUT	50.3	91.3	55.6	39.3	48.0	70.0	49.5	46.9	13.1	70.4
COURTESY BOOTH	49.5	84.3	70.9	18.5	89.4	44.2	43.4	40.2	26.3	33.6
FLORAL/PLANT SHOP	42.6	55.6	31.3	51.4	17.4	20.4	78.1	94.4	50.4	32.3
SERVICE MEAT	33.6	23.1	21.6	18.6	80.0	10.0	23.9	40.2	7.2	15.0
PHOTOGRAPHIC SERVICE CENTER	32.3	59.4	31.1	49.2	6.4	18.6	63.0	46.0	28.4	1.3
LIQUOR	31.2	1.7	1.4	58.4	30.4	5.5	4.7	53.8	20.3	.0
FRESH SEAFOOD	27.7	59.8	21.2	30.9	6.1	34.0	30.6	34.4	69.9	23.9
READING CENTER	21.0	4.9	13.1	10.4	3.2	71.8	13.5	44.5	28.8	23.9
COSMETIC CENTER	17.8	24.1	16.8	18.0	2.3	14.7	46.1	46.7	24.2	1.8
PHARMACY	16.4	2.1	25.5	17.2	13.6	11.9	29.6	26.5	13.1	.4
LUNCH COUNTER/ SNACK BAR	9.0	7.0	5.7	1.6	15.0	4.1	26.3	24.2	2.5	6.6
RESTAURANT	6.8	.7	1.2	1.2	17.1	4.7	19.2	4.5	2.5	10.2
CATERING	5.1	2.1	15.8	4.0	.6	2.7	21.2	10.2	2.1	.4

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 167B

SPECIALTY DEPARTMENTS AND SERVICES OFFERED BY SUPERMARKETS

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	6093	5677	416	106	154	261	364	1004	4204
BEER	73.0	73.7	63.2	66.0	62.3	68.6	75.3	59.4	76.9
SCRATCH AND/OR BAKE-OFF BAKERY	55.9	56.7	44.7	38.7	48.1	34.9	39.3	41.2	62.8
WINE	54.8	55.3	46.9	54.7	46.1	59.0	70.9	29.6	59.4
DELI WITH CARRY-OUT	50.3	50.6	46.2	45.3	46.8	42.1	45.6	46.6	52.4
COURTESY BOOTH	49.5	48.8	59.1	57.5	55.2	37.9	41.5	50.8	50.2
FLORAL/PLANT SHOP	42.6	43.8	25.7	17.0	27.3	23.8	36.0	38.2	46.6
SERVICE MEAT	33.6	34.0	27.9	22.6	33.1	15.7	20.9	24.3	38.3
PHOTOGRAPHIC SERVICE CENTER	32.3	32.2	32.7	22.6	39.6	28.4	43.4	33.8	31.2
LIQUOR	31.2	32.2	17.3	13.2	14.9	11.1	21.2	13.5	38.5
FRESH SEAFOOD	27.7	26.7	41.8	37.7	40.3	39.5	53.0	30.4	23.5
READING CENTER	21.0	19.6	40.9	41.5	49.4	25.7	38.5	28.6	15.9
COSMETIC CENTER	17.8	17.7	19.2	16.0	27.9	10.7	22.0	12.8	18.7
PHARMACY	16.4	17.2	4.3	2.8	.6	3.4	17.6	9.0	19.7
LUNCH COUNTER/ SNACK BAR	9.0	8.9	11.5	10.4	12.3	4.2	16.8	10.5	8.2
RESTAURANT	6.8	6.9	6.3	3.8	6.5	1.5	6.9	8.8	6.8
CATERING	5.1	4.2	18.3	17.9	21.4	14.2	15.7	6.5	2.4

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 168A

AVERAGE SUPERMARKET ADVERTISING COSTS AS A PERCENT OF SALES

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	1.2	1.0	1.5	202
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	1.2	1.0	1.8	72
10 - 30 MILLION	1.1	.9	1.5	45
31 - 100 MILLION	.9	.7	1.1	28
101 - 250 MILLION	.9	.6	1.1	21
251 - 500 MILLION	1.1	.9	1.2	20
OVER 500 MILLION	1.3	1.0	1.6	16

TABLE 168B

AVERAGE SUPERMARKET ADVERTISING COSTS AS A PERCENT OF SALES

	MEDIAN	MIDDLE RANGE		N=
ALL COMPANIES	1.2	1.0	1.5	202
REGION - CHAIN STORES				
NORTHEAST	1.1	.7	1.2	5
MIDDLE ATLANTIC	2.1	2.1	2.2	10
EAST NORTH CENTRAL	.9	.9	1.2	15
WEST NORTH CENTRAL				3
SOUTHEAST	.8	.8	1.0	10
WEST SOUTH CENTRAL	1.1	1.1	1.2	4
MOUNTAIN	1.0	1.0	1.0	4
PACIFIC	1.0	.6	1.0	8
CANADA				3
REGION - INDEPENDENT STORES				
NORTHEAST	1.1	.9	1.6	15
MIDDLE ATLANTIC	1.2	1.1	2.0	13
EAST NORTH CENTRAL	1.2	.9	1.6	33
WEST NORTH CENTRAL	.5	.2	.9	15
SOUTHEAST	1.0	1.0	1.5	29
WEST SOUTH CENTRAL	.6	.6	1.1	12
MOUNTAIN				3
PACIFIC	1.3	1.3	1.3	18
CANADA				2

NOTE: DATA WEIGHTED BY 1983 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 168C

PERCENTAGE OF ADVERTISING DOLLARS SPENT ON FOLLOWING METHODS

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST.	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	190	18	20	47	17	37	14	6	26	5
NEWSPAPER	42.1	68.0	23.3	48.5	76.8	57.5	57.4	71.6	61.0	45.8
IN-STORE COUPONS	14.9	.1	30.5	.8	2.4	.6	.0	1.6	1.1	.5
RADIO	12.8	5.7	19.2	6.5	6.2	7.8	12.4	5.2	6.8	5.7
MAILER/FLYER	12.4	7.6	10.0	28.9	4.2	19.3	6.7	12.7	12.8	8.8
TELEVISION	10.8	13.1	10.3	10.2	5.0	12.5	16.9	8.3	13.5	9.1
BILLBOARDS	.6	.4	.1	.2	5.3	.5	1.7	.0	1.3	3.1
OTHER	6.5	5.0	6.6	4.9	.0	1.9	4.8	.6	3.5	27.0

TABLE 168D

PERCENTAGE OF ADVERTISING DOLLARS SPENT ON FOLLOWING METHODS

	ALL COMPANIES	RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	190	58	132	70	41	27	21	18	13
NEWSPAPER	42.1	41.8	48.3	64.9	55.8	57.6	47.0	41.9	40.3
IN-STORE COUPONS	14.9	15.3	7.6	2.2	2.1	6.8	4.9	6.1	19.0
RADIO	12.8	13.0	7.9	6.8	8.8	5.3	4.5	8.4	15.2
MAILER/FLYER	12.4	11.8	24.6	20.9	25.2	18.8	19.7	22.7	8.4
TELEVISION	10.8	11.1	4.8	3.5	3.7	5.2	8.8	9.6	11.8
BILLBOARDS	.6	.5	1.7	.4	.1	.4	1.3	.9	.5
OTHER	6.5	6.5	5.1	1.2	4.2	5.9	13.8	10.3	4.9

NOTE: DATA WEIGHTED BY ADVERTISING DOLLARS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 169A

COMPANIES THAT WILL BE 100 PERCENT SCANNING BY END OF 1983 AND COMPANIES WITH PERSON RESPONSIBLE FOR SCANNING

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	127	5	14	41	16	19	8	3	18	3
WITH 100% SCANNING	36.2	40.0	35.7	39.0	37.5	26.3	37.5		44.4	
TOTAL COMPANIES	126	5	16	39	16	18	7	3	18	4
HAVE PERSON FOR SCANNING	65.9	80.0	68.8	64.1	50.0	66.7	85.7		66.7	75.0
DON'T HAVE PERSON	34.1	20.0	31.3	35.9	50.0	33.3	14.3		33.3	25.0

TABLE 169B

COMPANIES THAT WILL BE 100 PERCENT SCANNING BY END OF 1983 AND COMPANIES WITH PERSON RESPONSIBLE FOR SCANNING

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL COMPANIES	127	54	73	26	28	25	16	16	16
WITH 100% SCANNING	36.2	18.5	49.3	76.9	42.9	12.0	18.8	12.5	37.5
TOTAL COMPANIES	126	54	72	24	29	24	16	17	16
HAVE PERSON FOR SCANNING	65.9	61.1	69.4	83.3	72.4	37.5	81.3	64.7	56.3
DON'T HAVE PERSON	34.1	38.9	30.6	16.7	27.6	62.5	18.8	35.3	43.8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE. FOOD MARKETING INDUSTRY SPEAKS. 1984

TABLE 170A

CURRENT USES OF SCANNING POS DATA

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	128	6	16	40	15	19	7	3	18	4
CHECKER PERFORMANCE	96.9	100.0	93.8	95.0	100.0	100.0	100.0		94.4	100.0
SPECIALS	83.6	100.0	62.5	92.5	93.3	84.2	42.9		94.4	25.0
COUPON ACCOUNTING	65.6	66.7	56.3	65.0	66.7	84.2	42.9		66.7	25.0
WORK SCHEDULING	62.5	100.0	68.8	60.0	66.7	52.6	71.4		50.0	50.0
NEW PRODUCT EVALUATION	50.8	66.7	37.5	57.5	60.0	52.6	28.6		44.4	50.0
SHELF ALLOCATION	43.0	50.0	25.0	52.5	73.3	42.1	28.6		27.8	-
MEAT DEPARTMENT ANALYSIS	35.9	50.0	62.5	37.5	20.0	36.8	28.6		27.8	-
PRODUCE DEPARTMENT ANALYSIS	35.9	50.0	31.3	27.5	33.3	42.1	28.6		55.6	-
SHRINK ANALYSIS	31.3	66.7	37.5	22.5	46.7	36.8	14.3		33.3	-
PRICE ELASTICITY	18.8	16.7	25.0	17.5	6.7	31.6	28.6		16.7	-
REORDERING	10.9	33.3	18.8	5.0	26.7	5.3	14.3		-	25.0
OTHER	4.7	-	6.3	2.5	-	10.5	14.3		5.6	-

TABLE 170B

CURRENT USES OF SCANNING POS DATA

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	128	55	73	24	30	25	16	16	17
CHECKER PERFORMANCE	96.9	100.0	94.5	95.8	96.7	92.0	100.0	100.0	100.0
SPECIALS	83.6	72.7	91.8	91.7	90.0	92.0	68.8	68.8	76.5
COUPON ACCOUNTING	65.6	61.8	68.5	75.0	66.7	76.0	56.3	50.0	58.8
WORK SCHEDULING	62.5	63.6	61.6	58.3	63.3	56.0	68.8	43.8	88.2
NEW PRODUCT EVALUATION	50.8	43.6	56.2	66.7	60.0	36.0	43.8	43.8	47.1
SHELF ALLOCATION	43.0	30.9	52.1	75.0	43.3	36.0	31.3	25.0	35.3
MEAT DEPARTMENT ANALYSIS	35.9	38.2	34.2	37.5	26.7	40.0	37.5	43.8	35.3
PRODUCE DEPARTMENT ANALYSIS	35.9	27.3	42.5	58.3	30.0	28.0	43.8	25.0	29.4
SHRINK ANALYSIS	31.3	36.4	27.4	29.2	30.0	28.0	18.8	25.0	58.8
PRICE ELASTICITY	18.8	10.9	24.7	29.2	30.0	12.0	-	12.5	17.6
REORDERING	10.9	14.5	8.2	12.5	10.0	-	6.3	18.8	23.5
OTHER	4.7	5.5	4.1	4.2	6.7	-	6.3	6.3	5.9

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 171

SCANNING INSTALLATION UPDATE

Vendor	Number of Installations	Percent of Installations
NCR Corporation	3,487	36.8%
Data Checker	2,472	26.1
IBM Corporation	2,194	23.1
SWEDA International	603	6.3
Data Terminal Systems, Inc.	588	6.2
TEC America, Inc.	86	0.9
Berkel Incorporated	34	0.3
TOTAL	9,464	100.0%

Total Installations Year End

Installed In	Year End	This Year
1974	14	14
1975	60	46
1976	171	111
1977	309	138
1978	642	333
1979	1,472	830
1980	2,899	1,427
1981	4,568	1,669
1982	6,677	2,109
1983	9,144	2,467
First Quarter, 1984	9,464	320

INSTALLATIONS BY STATE

California	1,102	Alabama	159	New Mexico	45
Florida	757	Kansas	146	Hawaii	42
Texas	647	Iowa	143	North Dakota	37
Illinois	563	Oregon	138	South Dakota	30
Ohio	412	Tennessee	137	Montana	28
Washington	389	North Carolina	123	New Hampshire	27
Pennsylvania	350	Kentucky	118	Rhode Island	26
Missouri	303	Connecticut	82	District of Columbia	24
New York	283	Mississippi	82	Delaware	11
Indiana	241	Arkansas	78	Wyoming	10
				Vermont	6
Wisconsin	218	Utah	75		
Michigan	202	Oklahoma	69	**Total U.S.**	**9,005**
Minnesota	201	Nebraska	67		
Colorado	198	South Carolina	64	**Canadian**	**459**
Louisiana	196	Arizona	59		
				Adjustments	**4**
Virginia	191	Nevada	53		
Massachusetts	180	Alaska	50	**TOTAL**	**9,468**
Maryland	176	West Virginia	47		
New Jersey	166	Maine	46		
Georgia	163	Idaho	45		

Source:
Food Marketing Institute,
Scanning Update

TABLE 172A

PERCENTAGE OF SUPERMARKETS SELLING BULK FOOD ITEMS AND THE AVERAGE NUMBER OF ITEMS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	6089	286	505	1820	1393	784	293	545	237	226
WITH BULK FOODS	11.1	38.8	8.9	.9	4.9	7.3	6.5	54.7	16.9	8.4

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 172B

PERCENTAGE OF SUPERMARKETS SELLING BULK FOOD ITEMS AND THE AVERAGE NUMBER OF ITEMS

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	6089	5677	412	104	152	261	364	1004	4204
WITH BULK FOODS	11.1	10.4	19.4	23.1	26.3	12.3	8.2	7.9	11.1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 173A

PERCENTAGE OF SUPERMARKETS SELLING BULK FOOD ITEMS AND THE AVERAGE NUMBER OF ITEMS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	627	109	45	15	66	16	19	298	40	19
AVERAGE NUMBER OF ITEMS	55	48	128	93	29	31	63	25	201	166

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING BULK FOODS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 173B

PERCENTAGE OF SUPERMARKETS SELLING BULK FOOD ITEMS AND THE AVERAGE NUMBER OF ITEMS

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	627	552	75	21	38	32	30	38	468
AVERAGE NUMBER OF ITEMS	55	47	113	121	101	98	161	78	37

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING BULK FOODS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 174A

PERCENTAGE OF STORES SELLING BULK FOOD ITEMS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	673	111	45	16	68	57	19	298	40	19
NUTS/SEEDS	96.1	95.5	86.7	68.8	98.5	98.2	63.2	100.0	97.5	100.0
TRAIL MIX-TYPE PRODUCTS	94.8	95.5	73.3	87.5	97.1	80.7	100.0	100.0	97.5	89.5
DRIED FRUIT	84.0	62.2	100.0	75.0	97.1	22.8	52.6	99.3	87.5	100.0
GRAINS/BEANS	79.6	57.7	86.7	93.8	77.9	1.8	63.2	100.0	87.5	100.0
COFFEES	65.4	18.9	33.3	56.3	73.5	19.3	52.6	99.7	67.5	.0
PEANUT BUTTER, PRESERVES, HONEY	54.4	15.3	26.7	62.5	.0	1.8	15.8	99.7	22.5	89.5
HEALTH FOODS	43.8	.0	.0	.0	.0	.0	.0	99.0	.0	.0
CONFECTIONARY ITEMS	43.4	60.4	86.7	81.3	77.9	98.2	36.8	1.0	87.5	100.0
PASTA	36.3	59.5	100.0	56.3	77.9	26.3	.0	1.0	90.0	89.5
BAKERY PRODUCTS	34.6	45.0	95.6	18.8	95.6	78.9	.0	1.0	60.0	.0
POWDERED ITEMS	26.0	13.5	82.2	56.3	75.0	7.0	31.6	.7	80.0	100.0
COOKIES	16.3	9.9	82.2	56.3	.0	5.3	.0	1.0	70.0	100.0
TEAS	16.2	8.1	26.7	12.5	73.5	1.8	15.8	1.0	72.5	.0
HERBS AND SPICES	14.3	14.4	77.8	43.8	1.5	1.8	15.8	1.0	70.0	10.5
PET FOODS	11.7	1.8	48.9	.0	73.5	.0	.0	.0	12.5	.0
CHIPS,POTATO,TACO	8.5	.0	15.6	.0	73.5	.0	.0	.0	.0	.0
OTHER SNACK FOODS	7.4	.0	.0	.0	73.5	.0	.0	.0	.0	.0
SYRUPS/SAUCES	6.7	3.6	26.7	43.8	1.5	.0	.0	.7	10.0	78.9
CANDY	6.5	31.5	20.0	.0	.0	.0	.0	.0	.0	.0
JAMS/JELLIES	2.2	.0	.0	.0	.0	.0	.0	.0	.0	78.9
PRETZELS	1.5	.0	15.6	.0	.0	5.3	.0	.0	.0	.0
CEREALS	1.0	.0	15.6	.0	.0	.0	.0	.0	.0	.0
SUGAR	1.0	0.0	15.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0
OILS	.3	.0	.0	.0	.0	[illegible]	.0	.7	.0	.0
OTHER	.4	.0	.0	6.3	.0	.0	.0	.0	.0	10.5

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING BULK FOODS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 174B

PERCENTAGE OF STORES SELLING BULK FOOD ITEMS

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	673	593	80	24	40	32	30	79	468
NUTS/SEEDS	96.1	99.0	75.0	62.5	72.5	100.0	80.0	100.0	100.0
TRAIL MIX-TYPE PRODUCTS	94.8	96.6	81.3	75.0	87.5	53.1	100.0	88.6	100.0
DRIED FRUIT	84.0	85.2	75.0	58.3	82.5	90.6	100.0	40.5	91.2
GRAINS/BEANS	79.6	80.9	70.0	62.5	70.0	56.3	80.0	30.4	91.2
COFFEES	65.4	67.6	48.7	37.5	65.0	56.3	53.3	13.9	76.9
PEANUT BUTTER, PRESERVES, HONEY	54.4	56.0	42.5	45.8	45.0	21.9	3.3	11.4	68.4
HEALTH FOODS	43.8	49.7	.0	.0	.0	.0	.0	.0	63.0
CONFECTIONARY ITEMS	43.4	40.0	68.8	50.0	77.5	87.5	80.0	74.7	29.5
PASTA	36.3	33.1	60.0	54.2	50.0	96.9	100.0	22.8	28.2
BAKERY PRODUCTS	34.6	35.6	27.5	25.0	20.0	37.5	56.7	92.4	25.0
POWDERED ITEMS	26.0	23.4	45.0	41.7	45.0	43.8	50.0	27.8	20.5
COOKIES	16.3	13.2	40.0	37.5	27.5	53.1	36.7	20.3	9.8
TEAS	16.2	14.2	31.3	29.2	32.5	25.0	40.0	11.4	12.8
HERBS AND SPICES	14.3	10.6	41.2	25.0	45.0	40.6	36.7	20.3	6.8
PET FOODS	11.7	12.1	8.7	8.3	2.5	12.5	.0	8.9	13.9
CHIPS,POTATO,TACO	8.5	9.6	.0	.0	.0	.0	.0	8.9	10.7
OTHER SNACK FOODS	7.4	8.4	.0	.0	.0	.0	.0	.0	10.7
SYRUPS/SAUCES	6.7	5.1	18.8	16.7	25.0	3.1	3.3	11.4	4.3
CANDY	6.5	7.4	.0	.0	.0	.0	.0	11.4	7.5
JAMS/JELLIES	2.2	2.5	.0	.0	.0	.0	.0	.0	3.2
PRETZELS	1.5	1.2	3.7	.0	.0	9.4	.0	8.9	.0
CEREALS	1.0	1.2	.0	.0	.0	.0	.0	8.9	.0
SUGAR	1.0	1.2	0.0	0.0	0.0	0.0	0.0	8.9	0.0
OILS	.3	.0	2.5	8.3	.0	.0	.0	.0	.0
OTHER	.4	.2	2.5	.0	5.0	.0	3.3	.0	.0

NOTE: DATA WEIGHTED BY NUMBER OF STORES CARRYING BULK FOODS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 175

PRODUCE DEPARTMENT AS A PERCENT OF TOTAL SELLING AREA

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	10.0	8.0	11.0	8096
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	10.0	5.0	12.0	99
10 - 30 MILLION	8.5	5.0	10.0	180
31 - 100 MILLION	8.0	5.0	10.0	343
101 - 250 MILLION	7.0	5.0	15.0	345
251 - 500 MILLION	7.0	4.0	10.0	846
OVER 500 MILLION	10.0	9.0	11.1	6283
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	9.0	5.3	9.0	204
MIDDLE ATLANTIC	8.0	8.0	10.0	1050
EAST NORTH CENTRAL	15.1	7.0	15.1	1871
WEST NORTH CENTRAL	7.0	4.0	7.2	98
SOUTHEAST	10.0	8.0	10.0	520
WEST SOUTH CENTRAL	8.0	4.0	11.0	596
MOUNTAIN	24.0	7.8	27.0	40
PACIFIC	10.0	10.0	10.0	3456
CANADA	15.0	15.0	15.0	261
RETAIL AFFILIATION				
CHAIN	10.0	8.0	11.1	7633
INDEPENDENT	8.0	5.0	10.0	463

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 178A

CHANGE IN PRODUCE DEPARTMENT AS A PERCENT OF TOTAL STORE SELLING AREA

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	213	18	23	60	14	31	27	8	27	5
INCREASED	15.5	16.7	21.7	25.0	14.3	9.7	3.7	.0	11.1	20.0
AVERAGE PERCENT INCREASED	3.3	1.5	4.3	3.3	3.0	.6	5.0	-	3.6	10.0
DECREASED	1.9	5.6	.0	3.3	.0	3.2	.0	.0	.0	.0
AVERAGE PERCENT DECREASED	1.8	.5	-	2.8	-	1.1	-	-	-	-
REMAINED THE SAME	82.6	77.8	78.3	71.7	85.7	87.1	96.3	100.0	88.9	80.0

TABLE 178B

CHANGE IN PRODUCE DEPARTMENT AS A PERCENT OF TOTAL STORE SELLING AREA

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	213	51	162	83	53	34	16	12	15
INCREASED	15.5	31.4	10.5	9.6	9.4	20.6	18.8	41.7	33.3
AVERAGE PERCENT INCREASED	3.3	3.5	3.1	4.1	1.0	3.8	2.8	2.9	4.2
DECREASED	1.9	2.0	1.9	2.4	1.9	.0	.0	.0	6.7
AVERAGE PERCENT DECREASED	1.8	.5	2.3	2.6	1.5	-	-	-	.5
REMAINED THE SAME	82.6	66.7	87.7	88.0	88.7	79.4	81.3	58.3	60.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 177

PRODUCE DEPARTMENT AS A PERCENT OF TOTAL SALES

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	8.5	7.4	9.3	8235
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	7.0	6.0	8.3	107
10 - 30 MILLION	7.1	6.1	8.5	193
31 - 100 MILLION	7.0	6.0	8.0	394
101 - 250 MILLION	7.6	7.0	9.0	447
251 - 500 MILLION	7.1	6.6	7.5	881
OVER 500 MILLION	9.2	8.1	9.3	6213
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	9.5	7.2	9.5	213
MIDDLE ATLANTIC	8.5	7.5	8.5	1148
EAST NORTH CENTRAL	8.1	7.3	8.1	1891
WEST NORTH CENTRAL	8.4	7.1	9.0	99
SOUTHEAST	6.6	6.6	7.0	526
WEST SOUTH CENTRAL	7.5	3.7	9.3	601
MOUNTAIN	9.0	7.8	9.0	40
PACIFIC	9.3	9.2	9.3	3456
CANADA	9.5	9.5	9.5	261
RETAIL AFFILIATION				
CHAIN	8.5	7.5	9.3	7726
INDEPENDENT	7.3	6.1	8.5	509

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 178A

CHANGE IN PRODUCE DEPARTMENT SALES AS A PERCENT OF TOTAL SALES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	230	17	29	67	14	34	29	8	27	5
INCREASED	54.8	52.9	62.1	56.7	50.0	44.1	55.2	75.0	44.4	100.0
AVERAGE PERCENT INCREASED	1.7	5.2	2.2	.7	3.4	1.1	1.2	.2	2.6	.6
DECREASED	19.6	17.6	13.8	13.4	42.9	17.6	17.2	12.5	40.7	.0
AVERAGE PERCENT DECREASED	1.4	.1	.3	3.0	.5	.7	.7	.2	2.0	-
REMAINED THE SAME	25.7	29.4	24.1	29.9	7.1	38.2	27.6	12.5	14.8	.0

TABLE 178B

CHANGE IN PRODUCE DEPARTMENT SALES AS A PERCENT OF TOTAL SALES

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	230	59	171	83	58	40	19	14	16
INCREASED	54.8	69.5	49.7	42.2	60.3	55.0	78.9	78.6	50.0
AVERAGE PERCENT INCREASED	1.7	.9	2.0	2.7	1.1	2.3	.9	.8	.4
DECREASED	19.6	16.9	20.5	25.3	13.8	20.0	5.3	.0	43.8
AVERAGE PERCENT DECREASED	1.4	.3	1.7	2.4	.9	.4	.4	-	.2
REMAINED THE SAME	25.7	13.6	29.8	32.5	25.9	25.0	15.8	21.4	6.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE. FOOD MARKETING INDUSTRY SPEAKS. 1984

TABLE 179

AVERAGE NUMBER OF EMPLOYEES IN THE PRODUCE DEPARTMENT

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	3.5	3.0	4.0	8320
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	2.0	1.9	3.0	108
10 - 30 MILLION	2.8	2.0	4.0	202
31 - 100 MILLION	3.0	2.0	4.0	399
101 - 250 MILLION	3.0	2.0	4.0	447
251 - 500 MILLION	4.0	3.0	4.0	881
OVER 500 MILLION	3.5	3.5	4.5	6283
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	5.3	3.0	5.3	218
MIDDLE ATLANTIC	2.5	2.5	3.0	1148
EAST NORTH CENTRAL	4.5	4.0	4.5	1891
WEST NORTH CENTRAL	3.0	2.5	3.0	104
SOUTHEAST	4.0	3.0	4.0	597
WEST SOUTH CENTRAL	4.0	1.0	5.2	605
MOUNTAIN	8.0	1.5	8.0	40
PACIFIC	3.5	3.5	4.0	3456
CANADA	2.0	2.0	2.0	261
RETAIL AFFILIATION				
CHAIN	3.5	3.5	4.5	7796
INDEPENDENT	3.0	2.0	4.0	524

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 180

AVERAGE SALES PER LABOR HOUR FOR PRODUCE DEPARTMENT EMPLOYEES

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	100.00	77.30	100.00	8230
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	67.01	54.48	88.25	96
10 - 30 MILLION	80.00	70.00	92.21	176
31 - 100 MILLION	78.00	65.19	95.00	391
101 - 250 MILLION	93.00	75.00	105.00	403
251 - 500 MILLION	81.10	60.00	95.00	881
OVER 500 MILLION	100.00	90.00	100.00	6283
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	98.00	81.10	98.00	214
MIDDLE ATLANTIC	100.00	95.00	100.00	1146
EAST NORTH CENTRAL	77.30	77.30	77.30	1878
WEST NORTH CENTRAL	105.00	75.00	105.00	98
SOUTHEAST	32.00	.55	65.00	566
WEST SOUTH CENTRAL	100.00	85.00	113.70	580
MOUNTAIN	106.00	85.42	106.00	39
PACIFIC	100.00	100.00	103.00	3450
CANADA	150.00	150.00	150.00	259
RETAIL AFFILIATION				
CHAIN	100.00	77.30	100.00	7752
INDEPENDENT	82.42	66.02	95.00	478

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 181A

PERCENTAGE OF COMPANIES INCLUDING CERTAIN ITEMS IN PRODUCE SALES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	241	20	29	68	15	37	30	8	29	5
REFRIG. SALAD DRESSING	78.4	80.0	79.3	79.4	93.3	81.1	76.7	100.0	62.1	60.0
FLORAL	49.0	60.0	51.7	44.1	46.7	45.9	43.3	37.5	62.1	60.0
HEALTH/SNACK MIXES	36.1	45.0	41.4	39.7	40.0	24.3	23.3	50.0	41.4	20.0
CHILLED JUICES	27.4	15.0	41.4	13.2	53.3	24.3	26.7	62.5	41.4	-
SALAD BAR	12.9	45.0	27.6	10.3	-	10.8	6.7	-	3.4	-
FRESH PEANUT BUTTER	3.7	5.0	6.9	2.9	-	5.4	-	25.0	-	-
CHARCOAL	1.7	15.0	3.4	-	-	-	-	-	-	-
OTHER	15.8	15.0	24.1	16.2	20.0	10.8	10.0	12.5	17.2	20.0

TABLE 181B

PERCENTAGE OF COMPANIES INCLUDING CERTAIN ITEMS IN PRODUCE SALES

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	241	63	178	87	60	42	20	15	17
REFRIG. SALAD DRESSING	78.4	85.7	75.8	71.3	81.7	83.3	85.0	80.0	82.4
FLORAL	49.0	69.8	41.6	32.2	55.0	47.6	55.0	80.0	82.4
HEALTH/SNACK MIXES	36.1	36.5	36.0	24.1	46.7	45.2	30.0	26.7	52.9
CHILLED JUICES	27.4	36.5	24.2	12.6	31.7	35.7	45.0	40.0	35.3
SALAD BAR	12.9	22.2	9.6	6.9	15.0	7.1	20.0	33.3	23.5
FRESH PEANUT BUTTER	3.7	3.2	3.9	3.4	6.7	-	5.0	-	5.9
CHARCOAL	1.7	1.6	1.7	3.4	-	-	-	6.7	-
OTHER	15.8	20.6	14.0	16.1	15.0	7.1	15.0	20.0	35.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 182A
PERCENT OF COMPANIES OPERATING FRESH ORANGE JUICE MACHINES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	238	20	28	68	15	37	29	8	29	4
WITH ORANGE JUICE MACHINES	26.9	15.0	42.9	20.6	20.0	18.9	34.5	37.5	37.9	25.0

TABLE 182B
PERCENT OF COMPANIES OPERATING FRESH ORANGE JUICE MACHINES

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL COMPANIES	238	61	177	87	59	42	19	15	16
WITH ORANGE JUICE MACHINES	26.9	50.8	18.6	8.0	25.4	23.8	78.9	46.7	62.5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 183A
STORE DISPLAY TECHNIQUES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
PRODUCE DISPLAYED	8,287	217	1,147	1,889	104	597	596	40	3,436	261
BULK	75.7	68.3	73.4	75.3	67.6	52.3	82.9	86.0	81.7	55.5
PRE-PACK	24.3	31.7	26.8	24.7	32.4	47.7	17.1	14.0	18.3	44.5
PRODUCE WEIGHTED	8,286	218	1,147	1,872	104	596	596	40	3,452	261
AT FRONT END	72.6	59.4	81.0	20.4	81.3	42.0	87.4	61.6	99.5	96.9
IN PRODUCE DEPARTMENT	27.4	40.6	19.0	79.6	18.7	58.0	12.6	38.4	.4	3.1

TABLE 183B
STORE DISPLAY TECHNIQUES

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
PRODUCE DISPLAYED	8,287	7,783	504	105	201	392	425	881	6,283
BULK	75.7	76.5	64.2	56.8	66.2	67.6	80.4	73.8	76.8
PRE-PACK	24.3	23.5	35.8	43.2	33.8	32.4	19.6	26.2	23.2
PRODUCE WEIGHTED	8,286	7,782	504	104	195	385	438	881	6,283
AT FRONT END	72.6	73.5	57.8	54.7	62.1	60.3	85.1	54.6	75.6
IN PRODUCE DEPARTMENT	27.4	26.5	42.2	45.3	37.9	39.7	14.9	45.4	24.4

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 184A

PRODUCE PRICING

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
ITEM PRICE LOOK-UP AT FRONT END	235	20	28	66	15	35	30	8	28	5
YES	77.9	95.0	82.1	69.7	100.0	68.6	73.3	87.5	85.7	60.0
NO	22.1	5.0	17.9	30.3	-	31.4	26.7	12.5	14.3	40.0
SCANNING PRE-PACK (FOR STORES WITH SCANNING)	136	8	16	35	14	24	17	3	16	3
YES	44.1	37.5	37.5	51.4	42.9	41.7	41.2	-	56.3	33.3
NO	55.9	62.5	62.5	48.6	57.1	58.3	58.8	100.0	43.8	66.7

TABLE 184B

PRODUCE PRICING

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
ITEM PRICE LOOK-UP AT FRONT END	235	62	173	85	58	41	20	15	16
YES	77.9	80.6	76.9	67.1	84.5	85.4	80.0	100.0	68.8
NO	22.1	19.4	23.1	32.9	15.5	14.6	20.0	-	31.3
SCANNING PRE-PACK (FOR STORES WITH SCANNING)	136	48	88	30	34	31	16	10	15
YES	44.1	41.7	45.5	43.3	47.1	41.9	43.8	30.0	53.3
NO	55.9	58.3	54.5	56.7	52.9	58.1	56.3	70.0	46.7

NOTE: UNWEIGHTED DATA

SOURCE:- FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 185A

AVERAGE NUMBER OF FRESH PRODUCE ITEMS CARRIED

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	8187	218	1137	1855	90	584	555	39	3448	261
AVERAGE NUMBER OF ITEMS IN SUMMER	183	377	171	176	140	128	220	151	185	152
AVERAGE NUMBER OF ITEMS IN WINTER	163	356	189	157	102	120	197	123	149	151

TABLE 185B

AVERAGE NUMBER OF FRESH PRODUCE ITEMS CARRIED

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	8187	7749	438	75	165	371	412	881	6283
AVERAGE NUMBER OF ITEMS IN SUMMER	183	184	149	116	131	154	151	186	188
AVERAGE NUMBER OF ITEMS IN WINTER	163	164	130	100	116	140	127	175	166

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 180A
PRODUCE-RELATED SERVICES AVAILABLE TO CUSTOMERS

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	239	20	29	66	15	37	30	8	29	5
RECIPES FOR PRODUCE	64.4	55.0	75.9	54.5	86.7	67.6	63.3	75.0	62.1	80.0
INFORMATION ON HANDLING AND STORAGE	51.9	40.0	48.3	53.0	53.3	54.1	50.0	62.5	51.7	80.0
EATING CHARACTERISTICS AND HINTS	50.6	20.0	51.7	57.6	66.7	56.8	46.7	25.0	48.3	60.0
PRODUCE NUTRITIONAL INFORMATION	49.0	20.0	51.7	50.0	73.3	43.2	56.7	50.0	48.3	60.0

TABLE 180B
PRODUCE-RELATED SERVICES AVAILABLE TO CUSTOMERS

	ALL COMPANIES	RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	239	63	176	85	60	42	20	15	17
RECIPES FOR PRODUCE	64.4	85.7	56.8	52.9	63.3	61.9	75.0	86.7	100.0
INFORMATION ON HANDLING AND STORAGE	51.9	66.7	46.6	44.7	50.0	50.0	50.0	66.7	88.2
EATING CHARACTERISTICS AND HINTS	50.6	61.9	46.6	49.4	43.3	47.6	45.0	93.3	58.8
PRODUCE NUTRITIONAL INFORMATION	49.0	66.7	42.6	35.3	45.0	64.3	55.0	73.3	64.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 187A

PERCENTAGE OF COMPANIES WITH PRODUCE IDENTIFICATION PROGRAM AVAILABLE FOR EMPLOYEES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	237	20	29	65	15	36	30	8	29	5
FOR PRODUCE DEPARTMENT EMPLOYEES	46.4	55.0	48.3	36.9	66.7	38.9	53.3	75.0	44.8	40.0
FOR CASHIERS	36.7	40.0	51.7	15.4	73.3	33.3	40.0	62.5	41.4	40.0
TOTAL	78	8	15	8	9	10	11	4	11	2
IDENTIFICATION ACCURACY STANDARDS FOR CASHIERS										
YES	59.0	75.0	46.7	75.0	22.2	60.0	63.6	50.0	81.8	
NO	41.0	25.0	53.3	25.0	77.8	40.0	36.4	50.0	18.2	

TABLE 187B

PERCENTAGE OF COMPANIES WITH PRODUCE IDENTIFICATION PROGRAM AVAILABLE FOR EMPLOYEES

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	237	62	175	85	59	42	19	15	17
FOR PRODUCE DEPARTMENT EMPLOYEES	46.4	61.3	41.1	37.6	44.1	47.6	63.2	66.7	58.8
FOR CASHIERS	36.7	62.9	27.4	23.5	25.4	38.1	63.2	80.0	70.6
TOTAL	78	35	43	17	14	14	11	11	11
IDENTIFICATION ACCURACY STANDARDS FOR CASHIERS									
YES	59.0	62.9	55.8	52.9	42.9	71.4	81.8	72.7	36.4
NO	41.0	37.1	44.2	47.1	57.1	28.6	18.2	27.3	63.6

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 188A

PERCENTAGE OF COMPANIES TRAINING AND RETRAINING EMPLOYEES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	78	8	15	9	9	9	11	4	11	2
FOR CASHIERS										
TRAIN NEW HIRES	93.6	100.0	86.7	100.0	100.0	77.8	100.0	100.0	90.9	
RE-TRAIN CURRENT EMPLOYEES	66.7	75.0	66.7	33.3	66.7	88.9	72.7	50.0	81.8	
TOTAL	94	8	13	21	8	13	14	4	11	2
FOR PRODUCE CLERKS										
TRAIN NEW HIRES	93.6	100.0	92.3	95.2	100.0	76.9	100.0	100.0	90.9	
RE-TRAIN CURRENT EMPLOYEES	66.0	75.0	61.5	61.9	50.0	76.9	85.7	25.0	72.7	

TABLE 188B

PERCENTAGE OF COMPANIES TRAINING AND RETRAINING EMPLOYEES

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	78	34	44	18	14	14	11	11	10
FOR CASHIERS									
TRAIN NEW HIRES	93.6	100.0	88.6	94.4	92.9	78.6	100.0	100.0	100.0
RE-TRAIN CURRENT EMPLOYEES	66.7	61.8	70.5	61.1	64.3	78.6	72.7	54.5	70.0
TOTAL	94	35	59	27	19	19	11	9	9
FOR PRODUCE CLERKS									
TRAIN NEW HIRES	93.6	97.1	91.5	92.6	94.7	89.5	90.9	100.0	100.0
RE-TRAIN CURRENT EMPLOYEES	66.0	62.9	67.8	63.0	63.2	73.7	81.8	44.4	66.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 189A

POSITION OR DEPARTMENT RESPONSIBLE FOR PRODUCE IDENTIFICATION TRAINING

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	80	8	15	9	9	10	11	5	11	2
FOR CASHIERS										
FRONT-END MANAGER	46.2	75.0	33.3	44.4	77.8	10.0	54.5	60.0	36.4	
PRODUCE MANAGER	36.2	25.0	26.7	44.4	44.4	40.0	27.3	20.0	54.5	
TRAINING STAFF	32.5	12.5	40.0	33.3	11.1	20.0	36.4	40.0	54.5	
STORE MANAGER	31.3	37.5	13.3	11.1	44.4	70.0	36.4	40.0	18.2	
PRODUCE SUPERVISOR	11.2	-	13.3	22.2	11.1	10.0	-	-	18.2	
OTHER	2.5	-	6.7	-	-	10.0	-	-	-	
TOTAL	96	9	13	21	8	13	14	5	11	2
FOR PRODUCE										
PRODUCE MANAGER	69.8	77.8	84.6	66.7	87.5	61.5	57.1	60.0	63.6	
PRODUCE SUPERVISOR	49.0	44.4	53.8	47.6	25.0	69.2	42.9	40.0	54.5	
STORE MANAGER	20.8	22.2	15.4	14.3	25.0	23.1	28.6	80.0	-	
TRAINING STAFF	11.5	-	-	14.3	-	30.8	7.1	20.0	18.2	
FRONT-END MANAGER	3.1	-	7.7	-	-	-	-	20.0	9.1	
OTHER	6.3	-	-	14.3	-	-	14.3	20.0	-	

TABLE 189B

POSITION OR DEPARTMENT RESPONSIBLE FOR PRODUCE IDENTIFICATION TRAINING

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	80	35	45	18	15	15	11	11	10
FOR CASHIERS									
FRONT-END MANAGER	46.2	37.1	53.3	66.7	60.0	33.3	18.2	45.5	40.0
PRODUCE MANAGER	36.2	34.3	37.8	38.9	33.3	46.7	36.4	18.2	40.0
TRAINING STAFF	32.5	51.4	17.8	-	20.0	20.0	54.5	72.7	60.0
STORE MANAGER	31.3	22.9	37.8	33.3	60.0	26.7	18.2	18.2	20.0
PRODUCE SUPERVISOR	11.2	17.1	6.7	-	-	33.3	-	18.2	20.0
OTHER	2.5	-	4.4	-	-	13.3	-	-	-
TOTAL	96	35	61	27	21	19	11	9	9
FOR PRODUCE									
PRODUCE MANAGER	69.8	71.4	68.9	70.4	61.9	73.7	54.5	77.8	88.9
PRODUCE SUPERVISOR	49.0	68.6	37.7	14.8	52.4	63.2	72.7	88.9	44.4
STORE MANAGER	20.8	14.3	24.6	18.5	33.3	15.8	-	22.2	33.3
TRAINING STAFF	11.5	20.0	6.6	-	9.5	10.5	9.1	22.2	44.4
FRONT-END MANAGER	3.1	2.9	3.3	3.7	4.8	-	-	-	11.1
OTHER	6.3	-	9.8	11.1	14.3	-	-	-	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 190A
SALAD BAR SALES AS A PERCENT OF THE PRODUCE DEPARTMENT

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	3.0	1.0	5.2	242
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	3.0	2.1	4.0	6
10 - 30 MILLION	8.0	1.4	10.0	16
31 - 100 MILLION	5.0	2.7	5.2	15
101 - 250 MILLION	5.5	1.0	5.5	38
251 - 500 MILLION	.1	.1	.7	38
OVER 500 MILLION	3.0	3.0	5.0	129

TABLE 190B
SALAD BAR SALES AS A PERCENT OF THE PRODUCE DEPARTMENT

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	3.0	1.0	5.2	242
REGION - CHAIN STORES				
NORTHEAST	5.2	.1	12.2	42
MIDDLE ATLANTIC	5.0	5.0	5.5	86
EAST NORTH CENTRAL	.7	.1	.7	26
WEST NORTH CENTRAL	-	-	-	-
SOUTHEAST	-	-	-	-
WEST SOUTH CENTRAL				2
MOUNTAIN	-	-	-	-
PACIFIC	3.0	3.0	3.0	56
CANADA	-	-	-	-
REGION - INDEPENDENT STORES				
NORTHEAST	5.0	5.0	8.0	13
MIDDLE ATLANTIC				3
EAST NORTH CENTRAL	10.0	2.1	10.0	10
WEST NORTH CENTRAL	-	-	-	-
SOUTHEAST				3
WEST SOUTH CENTRAL	-	-	-	-
MOUNTAIN	-	-	-	-
PACIFIC				1
CANADA	-	-	-	-

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH SALAD BARS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 191A
PERCENTAGE OF STORES WITH SALAD BARS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	8319	218	1148	1890	104	597	605	40	3456	261
WITH SALAD BARS	3.2	25.2	7.9	2.4	1.9	1.0	.8	7.5	1.7	-

TABLE 191B
PERCENTAGE OF STORES WITH SALAD BARS

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	8319	7796	523	107	202	399	447	881	6283
WITH SALAD BARS	3.2	2.8	8.4	7.5	10.4	5.5	8.9	5.0	2.1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 192A

PERCENTAGE OF STORES WITH SALAD BARS HAVING EATING AREA AVAILABLE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	265	55	91	45	2	6	5	3	58	0
HAVE EATING AREA AVAILABLE	24.9	-	4.4	11.1		16.7	40.0		89.7	-

TABLE 192B

PERCENTAGE OF STORES WITH SALAD BARS HAVING EATING AREA AVAILABLE

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	265	221	44	8	21	22	40	44	130
HAVE EATING AREA AVAILABLE	24.9	28.5	6.8	37.5	-	4.5	-	4.5	46.2

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH SALAD BARS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 193A

AVERAGE NUMBER OF ITEMS CARRIED IN A SALAD BAR

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL STORES WITH SALAD BARS	254	55	87	42	2	2	5	3	58	-
VEGETABLE ITEMS	11.6	16.4	13.0	11.1			15.4		5.3	-
FRUIT ITEMS	6.6	12.1	5.0	5.1			12.2		4.8	-
SALAD DRESSINGS	5.8	7.6	5.2	7.5			6.2		4.1	-
LETTUCE-TYPE ITEMS	3.9	4.3	3.0	4.0			3.0		4.8	-
COLD CUTS	.3	.1	.0	1.4			1.2		.0	-
OTHER	2.7	7.0	1.3	4.0			.0		.1	-
TOTAL ITEMS	30.8	47.5	27.5	33.1			38.0		19.1	-

TABLE 193B

AVERAGE NUMBER OF ITEMS CARRIED IN A SALAD BAR

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL STORES WITH SALAD BARS	254	214	40	7	20	20	40	37	130
VEGETABLE ITEMS	11.6	11.9	9.6	9.4	9.3	9.8	6.7	10.2	14.2
FRUIT ITEMS	6.6	7.0	4.1	1.4	4.1	5.4	2.5	6.5	8.7
SALAD DRESSINGS	5.8	5.9	5.2	5.3	4.4	5.6	5.4	8.4	5.5
LETTUCE-TYPE ITEMS	3.9	4.2	2.4	2.4	2.9	2.9	2.2	4.5	4.6
COLD CUTS	.3	.3	.4	.6	.6	.1	.0	.0	.4
OTHER	2.7	2.8	1.8	2.3	2.3	3.8	.4	7.6	1.8
TOTAL ITEMS	30.8	32.1	23.6	21.4	23.8	27.8	17.3	37.1	35.2

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH SALAD BARS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 194A

STORE EMPLOYEES RESPONSIBLE FOR THE SALAD BARS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	168	23	89	36	2	4	5	3	6	-
ONE DESIGNATED FULL-TIME	22.6	.0	32.6	11.1		.0	60.0		.0	-
SEVERAL FULL-TIME PRODUCE EMPLOYEES	12.5	26.1	.0	19.4		25.0	.0		83.3	-
AVERAGE NUMBER	2.5	2.0	-	3.0		3.0	-		2.2	-
ONE PART-TIME EMPLOYEE	14.9	4.3	15.7	16.7		50.0	.0		16.7	-
OTHER	50.0	69.6	51.7	52.8		25.0	40.0		.0	-
AVERAGE NUMBER	2.5	2.5	2.1	3.3		3.0	5.0		-	-

TABLE 194B

STORE EMPLOYEES RESPONSIBLE FOR THE SALAD BARS

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	168	127	41	8	21	19	40	18	62
ONE DESIGNATED FULL-TIME	22.6	27.6	7.3	12.5	9.5	.0	72.5	5.6	8.1
SEVERAL FULL-TIME PRODUCE EMPLOYEES	12.5	11.0	17.1	37.5	19.0	36.8	.0	16.7	6.5
AVERAGE NUMBER	2.5	2.3	3.0	3.0	3.0	2.1	-	3.0	2.0
ONE PART-TIME EMPLOYEE	14.9	9.4	31.7	37.5	19.0	31.6	27.5	.0	1.6
OTHER	50.0	52.0	43.9	12.5	52.4	31.6	.0	77.8	83.9
AVERAGE NUMBER	2.5	2.3	3.3	2.0	3.1	3.8	-	2.7	2.2

NOTE: DATA WEIGHTED BY NUMBER OF STORES WITH SALAD BARS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 195A

PERCENTAGE OF COMPANIES PROVIDING HEALTH PROGRAMS AVAILABLE TO EMPLOYEES

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	292	25	38	69	24	62	21	15	33	5
HIGH BLOOD PRESSURE CONTROL	9.2	16.0	13.2	14.5	4.2	8.1	-	13.3	-	-
ALCOHOL AND CHEMICAL ABUSE CONTROL	9.2	12.0	-	7.2	12.5	9.7	-	6.7	18.2	60.0
MENTAL HEALTH COUNSELING	8.2	4.0	2.6	5.8	8.3	8.1	9.5	13.3	15.2	40.0
SMOKING CESSATION	7.9	20.0	5.3	8.7	8.3	8.1	-	6.7	6.1	-
HEALTH AND FITNESS PROGRAM	6.8	4.0	7.9	7.2	8.3	3.2	4.8	20.0	9.1	-
STRESS REDUCTION PROGRAM	5.5	4.0	5.3	7.2	4.2	6.5	-	6.7	6.1	-
NUTRITION AND WEIGHT CONTROL	4.1	8.0	5.3	5.8	-	1.6	-	13.3	-	20.0

TABLE 195B

PERCENTAGE OF COMPANIES PROVIDING HEALTH PROGRAMS AVAILABLE TO EMPLOYEES

	ALL COMPANIES	AFFILIATION			1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	WHOLE-SALER	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	292	84	177	31	81	51	45	31	22	31
HIGH BLOOD PRESSURE CONTROL	9.2	16.7	5.6	9.7	3.7	3.9	4.4	16.1	27.3	19.4
ALCOHOL AND CHEMICAL ABUSE CONTROL	9.2	15.5	4.0	22.6	2.5	3.9	8.9	6.5	9.1	25.8
MENTAL HEALTH COUNSELING	8.2	11.9	5.1	16.1	4.9	3.9	4.4	3.2	9.1	25.8
SMOKING CESSATION	7.9	13.1	5.1	9.7	7.4	2.0	6.7	6.5	13.6	16.1
HEALTH AND FITNESS PROGRAM	6.8	9.5	5.1	9.7	1.2	5.9	4.4	16.1	-	19.4
STRESS REDUCTION PROGRAM	5.5	7.1	5.1	3.2	1.2	3.9	8.9	6.5	4.5	16.1
NUTRITION AND WEIGHT CONTROL	4.1	9.5	2.3	-	1.2	2.0	4.4	12.9	4.5	9.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 196A

PERCENTAGE OF COMPANIES PROVIDING MEDICAL SERVICES FOR EMPLOYEES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	293	25	38	70	24	63	20	15	33	5
FIRST AID STATION	41.3	48.0	42.1	37.1	37.5	38.1	40.0	46.7	45.5	80.0
HEALTH NEWSLETTERS, BROCHURES	19.5	12.0	18.4	17.1	25.0	19.0	20.0	26.7	21.2	40.0
FIRST AID SPECIALIST	14.0	32.0	21.1	12.9	4.2	9.5	5.0	6.7	12.1	60.0
SICK ROOM	11.6	4.0	15.8	12.9	4.2	11.1	20.0	13.3	3.0	60.0
NURSE	2.7	4.0	2.6	2.9	-	1.6	5.0	-	-	40.0

TABLE 196B

PERCENTAGE OF COMPANIES PROVIDING MEDICAL SERVICES FOR EMPLOYEES

		AFFILIATION			1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	WHOLE-SALER	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	293	85	177	31	81	50	45	31	22	33
FIRST AID STATION	41.3	47.1	34.5	64.5	28.4	44.0	28.9	41.9	50.0	57.6
HEALTH NEWSLETTERS, BROCHURES	19.5	34.1	13.0	16.1	8.6	14.0	17.8	38.7	22.7	39.4
FIRST AID SPECIALIST	14.0	17.6	8.5	35.5	7.4	12.0	4.4	9.7	22.7	24.2
SICK ROOM	11.6	18.8	8.5	9.7	9.9	8.0	2.2	6.5	27.3	30.3
NURSE	2.7	9.4	-	-	-	-	-	3.2	4.5	18.2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 197A

PERCENTAGE OF COMPANIES PROVIDING CERTAIN MEDICAL HEALTH PLANS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	291	25	38	69	24	63	21	14	32	5
STOP-LOSS PROVISION	37.8	28.0	34.2	29.0	20.8	55.6	66.7	50.0	28.1	-
REIMBURSEMENT ACCOUNT	10.7	12.0	23.7	5.8	8.3	14.3	4.8	7.1	3.1	20.0
CAFETERIA BENEFITS PLAN	2.4	8.0	2.6	2.9	4.2	-	-	-	-	20.0

TABLE 197B

PERCENTAGE OF COMPANIES PROVIDING CERTAIN MEDICAL HEALTH PLANS

		AFFILIATION			1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	WHOLE-SALER	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	291	84	176	31	81	50	43	31	22	33
STOP-LOSS PROVISION	37.6	51.2	29.0	51.6	17.3	34.0	39.5	48.4	50.0	60.6
REIMBURSEMENT ACCOUNT	10.7	7.1	11.9	12.9	13.6	4.0	18.6	6.5	13.6	3.0
CAFETERIA BENEFITS PLAN	2.4	2.4	2.8	-	2.5	4.0	4.7	-	-	3.0

TABLE 198A

PERCENTAGE OF COMPANIES WHICH ENCOURAGE EMPLOYEES TO USE

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	288	23	38	70	24	61	21	15	31	5
AMBULATORY SURGERY	31.9	21.7	23.7	28.6	33.3	47.5	33.3	53.3	19.4	-
HOME HEALTH CARE	26.0	8.7	23.7	20.0	33.3	39.3	33.3	40.0	16.1	-
HMO'S (HEALTH MAINTENANCE)	21.5	21.7	21.1	27.1	20.8	14.8	9.5	20.0	35.5	-
HOME PROFESSIONAL NURSING	16.0	4.3	18.4	11.4	16.7	24.6	23.8	33.3	3.2	-

TABLE 198B

PERCENTAGE OF COMPANIES WHICH ENCOURAGE EMPLOYEES TO USE

		AFFILIATION			1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	WHOLE-SALER	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	288	85	174	29	79	51	43	31	22	33
AMBULATORY SURGERY	31.9	48.2	22.4	41.4	16.5	23.5	32.6	48.4	40.9	51.5
HOME HEALTH CARE	26.0	37.6	19.0	34.5	17.7	25.5	18.6	29.0	36.4	39.4
HMO'S (HEALTH MAINTENANCE)	21.5	21.2	20.7	27.6	17.7	31.4	9.3	16.1	13.6	36.4
HOME PROFESSIONAL NURSING	16.0	30.6	9.2	13.8	8.9	9.8	9.3	25.8	31.8	33.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 199A
DEDUCTIONS AND DEDUCTIBLES

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	293	25	38	70	24	63	21	15	32	5
PERCENTAGE OF COMPANIES WHICH INCREASED:										
FAMILY DEDUCTIONS	36.9	32.0	13.2	31.4	37.5	54.0	71.4	33.3	28.1	20.0
INDIVIDUAL DEDUCTIONS	36.5	32.0	13.2	31.4	33.3	50.8	76.2	26.7	34.4	20.0
TOTAL	292	25	38	69	23	63	21	15	33	5
EMPLOYEES PAY DEDUCTIBLES	76.0	80.0	63.2	75.4	82.6	84.1	85.7	86.7	63.6	40.0

TABLE 199B
DEDUCTIONS AND DEDUCTIBLES

	ALL COMPANIES	AFFILIATION			1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	WHOLE-SALER	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	293	85	177	31	81	50	45	31	22	33
PERCENTAGE OF COMPANIES WHICH INCREASED:										
FAMILY DEDUCTIONS	36.9	35.3	39.5	25.8	35.8	48.0	44.4	29.0	36.4	30.3
INDIVIDUAL DEDUCTIONS	36.5	34.1	39.0	29.0	35.8	46.0	44.4	22.6	40.9	30.3
TOTAL	292	85	176	31	81	50	44	31	22	33
EMPLOYEES PAY DEDUCTIBLES	76.0	81.2	72.2	83.9	66.7	70.0	86.4	80.6	72.7	84.8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 200A

PERCENTAGE OF COMPANIES WHICH EDUCATE EMPLOYEES TO

		AFFILIATION			1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	WHOLE-SALER	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	294	85	178	31	81	51	45	31	22	33
ASK SPECIFIC QUESTIONS BEFORE SURGICAL PROCEDURES	34.4	38.8	30.9	41.9	27.2	31.4	33.3	32.3	45.5	45.5
ASK FOR WRITTEN ESTIMATE BEFOREHAND	15.6	18.8	14.6	12.9	7.4	19.6	20.0	16.1	18.2	24.2

PERCENTAGE OF COMPANIES WHICH EDUCATE EMPLOYEES TO

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	294	25	38	70	24	63	21	15	33	5
ASK SPECIFIC QUESTIONS BEFORE SURGICAL PROCEDURES	34.4	28.0	26.3	21.4	37.5	44.4	47.6	60.0	39.4	-
ASK FOR WRITTEN ESTIMATE BEFOREHAND	15.6	12.0	15.8	14.3	12.5	11.1	14.3	40.0	24.2	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 200B

PERCENTAGE OF COMPANIES WHO ASK EMPLOYEES TO OBTAIN A SECOND OPINION

		AFFILIATION			1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDEPENDENT	WHOLESALER	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	291	85	175	31	78	51	45	31	22	33
REQUIRE										
FOR SPECIFIC PROCEDURES	20.6	25.9	17.1	25.8	16.7	11.8	24.4	25.8	36.4	18.2
FOR ALL PROCEDURES	2.1	1.2	2.9	-	5.1	2.0	-	3.2	-	-
TOTAL	285	83	172	30	77	50	43	30	22	33
VOLUNTARY										
FOR SPECIFIC PROCEDURES	27.7	34.9	25.0	23.3	24.7	20.0	27.9	36.7	45.5	30.3
FOR ALL PROCEDURES	21.4	27.7	17.4	26.7	18.2	12.0	20.9	16.7	36.4	33.3
TOTAL	91	33	48	10	20	13	12	11	11	14
SECOND OPINION PAID BY:										
COMPANY	63.7	81.8	54.2	50.0	35.0	61.5	58.3	81.8	100.0	78.6
EMPLOYEE	14.3	12.1	16.7	10.0	20.0	15.4	-	27.3	-	21.4
OTHER	26.4	9.1	35.4	40.0	45.0	38.5	41.7	-	-	7.1

PERCENTAGE OF COMPANIES WHO ASK EMPLOYEES TO OBTAIN A SECOND OPINION

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	291	25	38	69	24	63	20	15	32	5
REQUIRE										
FOR SPECIFIC PROCEDURES	20.6	32.0	21.1	20.3	12.5	22.2	25.0	20.0	15.6	-
FOR ALL PROCEDURES	2.1	-	2.6	2.9	-	3.2	-	6.7	-	-
TOTAL	285	25	37	69	23	62	20	13	31	5
VOLUNTARY										
FOR SPECIFIC PROCEDURES	27.7	28.0	32.4	24.6	34.8	24.2	45.0	30.8	22.6	-
FOR ALL PROCEDURES	21.4	20.0	18.9	14.5	30.4	32.3	30.0	23.1	9.7	-
TOTAL	91	9	12	19	8	21	9	5	8	-
SECOND OPINION PAID BY:										
COMPANY	63.7	66.7	66.7	52.6	50.0	71.4	66.7	80.0	62.5	-
EMPLOYEE	14.3	-	16.7	15.8	12.5	14.3	33.3	-	12.5	-
OTHER	26.4	44.4	25.0	31.6	37.5	19.0	-	20.0	37.5	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 201A
CHANGE IN MEDICAL BENEFITS COSTS DURING THE PAST TWO YEARS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	239	21	29	58	20	48	19	13	26	5
INCREASED	82.4	76.2	75.9	86.2	85.0	85.4	94.7	69.2	76.9	80.0
AVERAGE PERCENT INCREASED	26.34	25.67	24.71	25.40	28.87	26.80	26.68	30.35	26.94	20.63
DECREASED	4.2	4.8	3.4	3.4	10.0	6.3	.0	7.7	.0	.0
AVERAGE PERCENT DECREASED	13.44	12.74	12.00	5.83	9.50	17.10	-	27.70	-	-
REMAINED THE SAME	13.4	19.0	20.7	10.3	5.0	8.3	5.3	23.1	23.1	20.0

TABLE 201B
CHANGE IN MEDICAL BENEFITS COSTS DURING THE PAST TWO YEARS

		AFFILIATION			1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	WHOLE-SALER	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	239	66	146	27	63	43	37	25	18	26
INCREASED	82.4	81.8	82.9	81.5	85.7	79.1	78.4	80.0	83.3	88.5
AVERAGE PERCENT INCREASED	26.34	27.40	25.82	26.62	21.35	25.39	31.51	31.80	19.40	30.97
DECREASED	4.2	3.0	4.1	7.4	1.6	7.0	5.4	.0	5.6	3.8
AVERAGE PERCENT DECREASED	13.44	18.22	12.20	12.37	15.00	6.40	19.50	-	11.45	25.00
REMAINED THE SAME	13.4	15.2	13.0	11.1	12.7	14.0	16.2	20.0	11.1	7.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 202A

PERCENTAGE OF COMPANIES CONSIDERING ALTERNATIVES FOR LOWERING MEDICAL BENEFITS COSTS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	261	22	29	65	20	59	20	14	28	4
PERCENT CONSIDERING ALTERNATIVES	79.7	68.2	72.4	72.3	80.0	89.8	85.0	85.7	82.1	100.0
TOTAL	206	14	21	47	16	52	17	12	23	4
TYPES OF ALTERNATIVES										
INCREASE DEDUCTIBLES	30.1	21.4	14.3	34.0	37.5	36.5	41.2	25.0	21.7	-
CONSIDER/INSTITUTE SELF-INSURANCE/ SELF-FUNDING	16.0	21.4	19.0	27.7	6.3	9.6	5.9	33.3	8.7	-
(CONSIDER) ALTERNATIVE CARRIERS	13.1	7.1	14.3	8.5	6.3	15.4	17.6	16.7	17.4	25.0
REVISE HOSPITAL/DOCTOR PROCEDURES	12.1	7.1	19.0	10.6	12.5	15.4	17.6	-	8.7	-
REVISE COVERAGE	8.7	14.3	9.5	10.6	-	7.7	5.9	8.3	8.7	25.0
INCREASE EMPLOYEE CONTRIBUTION	7.3	7.1	9.5	4.3	12.5	5.8	5.9	8.3	13.0	-
CHANGE PLAN/PROGRAM	7.3	-	14.3	2.1	-	11.5	-	16.7	8.7	25.0
CHANGE TO MAJOR OR COMPREHENSIVE	5.3	7.1	4.8	6.4	12.5	1.9	5.9	8.3	4.3	-
CONSIDER HMO'S, CAFETERIA	3.4	-	-	10.6	-	-	-	-	8.7	-
INCREASE EMPLOYEE AWARENESS	2.9	7.1	-	-	-	1.9	11.8	8.3	4.3	-
ADD EMPLOYEE INCENTIVES	1.0	-	4.8	-	-	1.9	-	-	-	-
START TRUSTS	1.0	-	4.8	2.1	-	-	-	-	-	-
OTHER	32.5	50.0	33.3	25.5	37.5	34.6	41.2	25.0	26.1	25.0

TABLE 202B

PERCENTAGE OF COMPANIES CONSIDERING ALTERNATIVES FOR LOWERING MEDICAL BENEFITS COSTS

		AFFILIATION			1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	WHOLE-SALER	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	261	75	159	27	72	45	42	27	18	30
PERCENT CONSIDERING ALTERNATIVES	79.7	81.3	79.2	77.8	77.8	77.8	85.7	81.5	77.8	80.0
TOTAL	206	61	124	21	54	35	36	22	14	24
TYPES OF ALTERNATIVES										
INCREASE DEDUCTIBLES	30.1	29.5	29.0	38.1	29.6	22.9	36.1	22.7	42.9	25.0
CONSIDER/INSTITUTE SELF-INSURANCE/ SELF-FUNDING	16.0	11.5	17.7	19.0	18.5	14.3	19.4	18.2	7.1	8.3
(CONSIDER) ALTERNATIVE CARRIERS	13.1	3.3	18.5	9.5	18.5	22.9	16.7	4.5	-	-
REVISE HOSPITAL/DOCTOR PROCEDURES	12.1	18.0	7.3	23.8	5.6	5.7	8.3	9.1	28.6	25.0
REVISE COVERAGE	8.7	8.2	9.7	4.8	9.3	2.9	13.9	18.2	-	8.3
INCREASE EMPLOYEE CONTRIBUTION	7.3	8.2	7.3	4.8	9.3	8.6	5.6	4.5	14.3	4.2
CHANGE PLAN/PROGRAM	7.3	11.5	5.6	4.8	3.7	5.7	2.8	13.6	-	25.0
CHANGE TO MAJOR OR COMPREHENSIVE	5.3	8.2	4.0	4.8	-	5.7	8.3	4.5	-	16.7
CONSIDER HMO'S, CAFETERIA	3.4	1.6	4.0	4.8	-	11.4	2.8	-	-	4.2
INCREASE EMPLOYEE AWARENESS	2.9	4.9	2.4	-	1.9	5.7	-	9.1	-	4.2
ADD EMPLOYEE INCENTIVES	1.0	1.6	.8	-	-	-	-	4.5	-	4.2
START TRUSTS	1.0	1.6	.8	-	-	2.9	-	4.5	-	-
OTHER	32.5	37.7	29.8	33.3	29.6	34.3	19.4	45.5	35.7	41.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 203A

PERCENTAGE OF COMPANIES WITH ATM OR OTHER ELECTRONIC BANKING SERVICES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	321	24	35	72	32	58	31	13	46	10
PERCENT WITH ATM OR EFT-POS	24.9	29.2	25.7	29.2	43.8	19.0	19.4	38.5	8.7	30.0

TABLE 203B

PERCENTAGE OF COMPANIES WITH ATM OR OTHER ELECTRONIC BANKING SERVICES

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	321	128	193	88	57	65	42	27	42
PERCENT WITH ATM OR EFT-POS	24.9	40.6	14.5	12.5	10.5	21.5	28.6	48.1	57.1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 204A

PERCENTAGE OF SUPERMARKETS USING ATM MACHINES/ NON-ATM ELECTRONIC BANKING

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	14,920	450	1,841	2,597	508	2,836	666	1,238	3,261	1,523
PERCENT WITH ATMS	8.4	21.8	5.5	6.4	21.3	12.6	15.8	4.5	7.6	.5
PERCENT WITH NON-ATM ELECTRONIC BANKING	2.9	10.2	8.0	7.4	6.9	.3	.2	.0	.0	.0

TABLE 204B

PERCENTAGE OF SUPERMARKETS USING ATM MACHINES/ NON-ATM ELECTRONIC BANKING OR CASH DISPENSERS

	ALL STORES	RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	14,920	14,318	602	107	197	633	1,179	1,459	11,345
PERCENT WITH ATMS	8.4	8.4	8.5	10.3	2.0	7.4	10.0	6.4	8.6
PERCENT WITH NON-ATM ELECTRONIC BANKING	2.9	2.9	2.2	.9	4.1	.6	2.9	.3	3.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 205A

LOCATION OF AUTOMATIC TELLER MACHINES

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS: NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1,251	97	107	170	112	358	94	57	248	8
NEAR ENTRY IN SUPERMARKET	33.8	26.8	29.9	52.4	53.6	40.8	22.3	50.9	5.2	87.5
NEAR CHECKOUTS	32.5	15.5	56.1	20.0	11.6	5.3	38.3	28.1	85.9	12.5
THROUGH THE WALL	20.2	.0	2.8	22.9	.9	53.4	.0	19.3	3.2	.0
OUTSIDE SUPERMARKET	1.9	.0	1.9	3.5	1.8	.0	.0	1.8	5.2	.0
OTHER	11.5	57.7	9.3	1.2	32.1	.6	39.4	.0	.4	.0

TABLE 205B

LOCATION OF AUTOMATIC TELLER MACHINES

	ALL STORES	RETAIL AFFIL.: CHAIN	RETAIL AFFIL.: INDEPENDENT	1983 RETAIL SALES (IN MILLIONS OF DOLLARS): UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1,251	1,198	53	10	4	50	122	95	970
NEAR ENTRY IN SUPERMARKET	33.8	33.8	34.0	20.0	25.0	42.0	48.4	46.3	30.5
NEAR CHECKOUTS	32.5	31.8	49.1	50.0	25.0	40.0	38.5	31.6	31.3
THROUGH THE WALL	20.2	20.5	13.2	30.0	25.0	14.0	1.6	2.1	24.5
OUTSIDE SUPERMARKET	1.9	2.0	.0	.0	.0	2.0	.8	5.3	1.8
OTHER	11.5	11.9	3.8	.0	25.0	2.0	10.7	14.7	11.9

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 208

TYPICAL NUMBER OF TRANSACTIONS PER WEEK PER MACHINE

	MEDIAN	MIDDLE RANGE		N=
ALL STORES	900.0	500.0	1250.0	801
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10 MILLION	430.0	200.0	980.0	5
10 - 30 MILLION				2
31 - 100 MILLION	900.0	900.0	1500.0	25
101 - 250 MILLION	588.0	160.0	878.0	87
251 - 500 MILLION	1000.0	270.0	1000.0	44
OVER 500 MILLION	1000.0	500.0	1250.0	638
GEOGRAPHIC REGION OF HEADQUARTERS				
NORTHEAST	1250.0	1250.0	1250.0	69
MIDDLE ATLANTIC	925.0	650.0	1200.0	100
EAST NORTH CENTRAL	2000.0	2000.0	2000.0	125
WEST NORTH CENTRAL	750.0	750.0	750.0	90
SOUTHEAST	500.0	500.0	1000.0	325
WEST SOUTH CENTRAL	160.0	160.0	1000.0	33
MOUNTAIN	800.0	588.0	5500.0	39
PACIFIC	878.0	878.0	878.0	14
CANADA	2000.0	2000.0	2000.0	6
RETAIL AFFILIATION				
CHAIN	878.0	500.0	1250.0	770
INDEPENDENT	900.0	430.0	1500.0	31

NOTE: DATA WEIGHTED BY SUPERMARKETS WITH ATMS INSTALLED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 207A

OWNERS OF AUTOMATIC TELLER MACHINES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1,250	97	107	169	112	358	94	57	248	8
BANK	37.3	94.8	53.3	68.0	83.9	14.2	9.6	57.9	3.2	87.5
SUPERMARKET COMPANY	22.0	.0	29.9	.0	.0	54.2	52.1	.0	.0	.0
THIRD PARTY SERVICE	17.8	5.2	16.8	.0	.9	30.4	21.3	12.3	25.0	.0
OTHER FINANCIAL INSTITUTIONS	9.4	.0	.0	27.2	15.2	.0	17.0	29.8	8.1	12.5
OTHER	13.6	.0	.0	4.7	.0	1.1	.0	.0	63.7	.0

TABLE 207B

OWNERS OF AUTOMATIC TELLER MACHINES

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1,250	1,198	52	9	4	50	122	95	970
BANK	37.3	35.6	76.9	88.9	75.0	78.0	58.2	60.0	29.7
SUPERMARKET COMPANY	22.0	23.0	.0	.0	.0	.0	.0	.0	28.4
THIRD PARTY SERVICE	17.8	17.8	17.3	.0	.0	18.0	17.2	18.9	17.9
OTHER FINANCIAL INSTITUTIONS	9.4	9.6	3.8	11.1	.0	4.0	18.9	16.8	7.7
OTHER	13.6	14.1	1.9	.0	25.0	.0	5.7	4.2	16.3

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 208

REIMBURSEMENTS FOR NON-SUPERMARKET OWNED ATM EQUIPMENT

	ALL COMPANIES
LIST OF METHODS AND FEES	56
ANNUAL FEE	7.1 $2612.50
MONTHLY FEE	37.5 $720.95
FLAT FEE	1.8 $100.00
INCLUDED IN OTHER BANK FEE	5.4 -
NO CHARGE	17.9 -
MONTHLY AND PER TRANSACTION	21.4 $247.92 .20
MISCELLANEOUS	- -
ANNUAL PER SQUARE FOOT	7.1 $71.25
PER TRANSACTION	17.9 $.17

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 209A
ATM SYSTEM

	ALL STORES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	1,161	79	106	168	105	353	37	57	248	8
ATMS IN A SHARED SYSTEM	83.6	12.7	98.1	73.2	93.3	97.7	100.0	35.1	94.4	.0
ATMS IN A DEDICATED SYSTEM	16.3	87.3	1.9	26.8	5.7	2.3	.0	54.9	5.6	100.0

TABLE 209B
ATM SYSTEM

	ALL STORES	RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	1,161	1,123	38	7	4	38	89	90	933
ATMS IN A SHARED SYSTEM	83.6	84.1	68.4	57.1	50.0	65.8	57.3	76.7	87.9
ATMS IN A DEDICATED SYSTEM	16.3	15.8	31.6	42.9	50.0	34.2	41.6	23.3	12.1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 210
CUSTOMER USE AND ACCESS TO THE ATM MACHINE

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	26	17	9	5	-	5	5	3	8
PERCENTAGE OF CUSTOMERS WITH ACCESS TO MACHINE	29.5	33.5	22.0	24.9	-	15.0	36.4	35.8	34.8
TOTAL	22	13	9	5	-	5	4	4	4
PERCENTAGE OF CUSTOMERS WHO USE MACHINE	11.5	11.8	11.1	8.3	-	11.8	9.5	14.9	13.8

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 211A

MIXTURE OF ATM TRANSACTIONS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	615	13	107	14	93	321	33	14	14	6
CASH DISPENSING	65.7	100.0	73.3	62.3	50.3	70.9	79.9	83.2	75.4	80.0
BALANCE INQUIRY	20.4	.0	13.7	9.3	23.9	24.6	20.1	.0	4.9	1.0
DEPOSIT TAKING	13.3	.0	11.1	21.3	21.4	8.2	.0	15.6	19.7	10.0
BALANCE TRANSFER	2.1	.0	1.6	2.3	4.4	.5	.0	.7	.0	9.0
OTHER	.3	.0	.3	4.7	.0	.0	.0	.6	.0	.0

TABLE 211B

MIXTURE OF ATM TRANSACTIONS

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL STORES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	615	595	20	6	1	14	75	41	478
CASH DISPENSING	65.7	66.2	52.5	48.7		53.8	51.7	61.9	71.9
BALANCE INQUIRY	20.4	20.9	7.1	4.6		7.7	24.9	20.5	19.5
DEPOSIT TAKING	13.3	12.5	33.8	34.2		32.9	18.3	13.8	10.2
BALANCE TRANSFER	2.1	1.9	6.2	10.6		5.6	4.2	3.5	1.0
OTHER	.3	.3	.3	2.0		.0	.8	.3	.1

NOTE: DATA WEIGHTED BY TOTAL NUMBER OF ATM MACHINES IN SUPERMARKETS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 212A
SYSTEM OPERATION OF THE ATM

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	70	5	5	20	14	9	5	5	4	3
CUSTOMER OPERATED	85.7	60.0	20.0	95.0	78.6	100.0	100.0	100.0	100.0	
CUSTOMER AND CLERK OPERATED	10.0	20.0	40.0	5.0	21.4	-	-	-	-	
CLERK OPERATED	4.3	20.0	40.0	-	-	-	-	-	-	

TABLE 212B
SYSTEM OPERATION OF THE ATM

	ALL COMPANIES	RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	70	46	24	9	4	14	11	13	19
CUSTOMER OPERATED	85.7	89.1	79.2	44.4	100.0	100.0	100.0	84.6	84.2
CUSTOMER AND CLERK OPERATED	10.0	4.3	20.8	55.6	-	-	-	7.7	5.3
CLERK OPERATED	4.3	6.5	-	-	-	-	-	7.7	10.5

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 213A

RATING ATM OPERATION
1 INDICATING POOR AND 5 INDICATING EXCELLENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	58	3	5	15	13	6	5	5	4	2
CUSTOMER CONVENIENCE	4.1		4.0	4.0	4.1	4.7	4.2	4.2	4.5	
EASE OF USE	4.1		4.0	4.1	4.2	4.5	4.2	4.2	3.8	
OVERALL PERFORMANCE	4.0		3.2	4.1	4.2	4.2	3.8	4.2	3.8	
MAINTENANCE	4.0		4.2	4.0	3.8	4.7	3.4	4.0	3.8	
HARDWARE RELIABILITY	3.9		4.2	3.8	3.8	4.5	3.4	4.2	3.5	
CUSTOMER ACCEPTANCE	3.7		3.8	3.6	3.9	4.2	3.6	3.6	3.8	
CUSTOMER USAGE	3.3		3.2	3.2	3.5	3.5	3.2	3.2	3.3	
STORE SAVINGS	3.0		2.8	3.0	2.9	3.3	2.4	3.0	3.3	

TABLE 213B

RATING ATM OPERATION
1 INDICATING POOR AND 5 INDICATING EXCELLENT

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	58	40	18	6	2	13	9	11	17
CUSTOMER CONVENIENCE	4.1	4.1	4.1	3.8		4.0	4.0	4.0	4.3
EASE OF USE	4.1	4.2	4.1	3.8		4.2	4.0	4.2	4.2
OVERALL PERFORMANCE	4.0	3.9	4.2	3.8		4.3	4.1	3.9	3.7
MAINTENANCE	4.0	4.0	3.9	3.7		4.0	3.7	4.0	4.2
HARDWARE RELIABILITY	3.9	3.9	3.8	3.7		3.8	3.8	4.0	4.0
CUSTOMER ACCEPTANCE	3.7	3.8	3.7	3.3		3.8	3.7	3.8	3.7
CUSTOMER USAGE	3.3	3.3	3.2	3.0		3.3	3.0	3.2	3.6
STORE SAVINGS	3.0	2.9	3.2	2.7		3.2	2.8	2.6	3.2

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 214A

EFFECT OF ATM ON CHECK VOLUME

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	48	31	17	7	1	12	8	8	12
CHECK VOLUME DECREASED	20.8	25.8	11.8	14.3		8.3	25.0	12.5	41.7
CHECK VOLUME REMAINED THE SAME	72.9	71.0	76.5	71.4	-	83.3	75.0	75.0	58.3
CHECK VOLUME INCREASED	6.3	3.2	11.8	14.3	-	8.3	-	12.5	-

TABLE 214B

EFFECT OF ATM ON CHECK VOLUME

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	48	2	3	13	13	4	5	3	3	2
CHECK VOLUME DECREASED	20.8			23.1	7.7	25.0	-			
CHECK VOLUME REMAINED THE SAME	72.9			76.9	92.3	50.0	100.0			
CHECK VOLUME INCREASED	6.3			-	-	25.0	-			

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKFTING INDUSTRY SPEAKS, 1984

TABLE 215A

EFFECT OF ATM ON CASH VOLUME

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	42	2	1	12	14	2	5	3	2	1
CASH VOLUME DECREASED	14.3			8.3	7.1		20.0			
CASH VOLUME REMAINED THE SAME	73.8			83.3	85.7		60.0			
CASH VOLUME INCREASED	11.9			8.3	7.1		20.0			

TABLE 215B

EFFECT OF ATM ON CASH VOLUME

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	42	27	15	6	1	10	9	6	10
CASH VOLUME DECREASED	14.3	22.2	-	-		-	22.2	16.7	30.0
CASH VOLUME REMAINED THE SAME	73.8	63.0	93.3	83.3		100.0	66.7	66.7	50.0
CASH VOLUME INCREASED	11.9	14.8	6.7	16.7		-	11.1	16.7	20.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 218A

PERSONNEL/AGENCIES RECEIVING CUSTOMER COMPLAINTS ON ATM EQUIPMENT

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	66	3	5	19	14	8	5	5	4	3
BANK, FINANCIAL INSTITUTE	51.5		40.0	63.2	35.7	37.5	60.0	60.0	50.0	
SUPERMARKET PERSONNEL	48.5		60.0	36.8	78.6	50.0	40.0	20.0	50.0	
OTHER	6.1		-	10.5	-	12.5	-	20.0	-	
UNKNOWN	1.5		-	-	-	-	-	20.0	-	

TABLE 218B

PERSONNEL/AGENCIES RECEIVING CUSTOMER COMPLAINTS ON ATM EQUIPMENT

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	66	44	22	7	4	14	10	12	19
BANK, FINANCIAL INSTITUTE	51.5	56.8	40.9	14.3	100.0	42.9	80.0	33.3	57.9
SUPERMARKET PERSONNEL	48.5	45.5	54.5	71.4	-	57.1	40.0	58.3	42.1
OTHER	6.1	6.8	4.5	-	-	7.1	-	8.3	10.5
UNKNOWN	1.5	-	4.5	14.3	-	-	-	-	-

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 217A

ANTICIPATED ATM SERVICES IN THE NEXT FIVE YEARS OF ATM SYSTEM

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	23	2	4	6	4	4	-	2	1	-
EFT	34.8		25.0	33.3	50.0	25.0	-			-
CHECK VERIFICATION/AUTHORIZATION	21.7		25.0	16.7	25.0	50.0	-			-
PROCESSING PAYMENTS	17.4		25.0	33.3	25.0	.0	-			-
ACCESS TO OTHER ACCOUNTS	13.0		.0	16.7	25.0	25.0	-			-
EXPANSION OF CURRENT FUNCTIONS	8.7		.0	16.7	.0	.0	-			-
LOAN PAYMENTS	4.3		25.0	.0	.0	.0	-			-
ACCOUNT TRANSFERS	4.3		.0	.0	.0	25.0	-			-
POS VERIFICATION	.0		.0	.0	.0	.0	-			-
LOWER VOLUMES OF CHECKS CASHED	.0		.0	.0	.0	.0	-			-
BALANCE INQUIRY	.0		.0	.0	.0	.0	-			-
OTHER	34.8		25.0	50.0	25.0	25.0	-			-

TABLE 217B

ANTICIPATED ATM SERVICES IN THE NEXT FIVE YEARS OF ATM SYSTEM

	ALL COMPANIES	RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
		CHAIN	INDE-PENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	23	17	6	2	-	4	3	4	10
EFT	34.8	35.3	33.3		-	25.0		50.0	20.0
CHECK VERIFICATION/AUTHORIZATION	21.7	29.4	.0		-	.0		50.0	30.0
PROCESSING PAYMENTS	17.4	11.8	33.3		-	25.0		.0	20.0
ACCESS TO OTHER ACCOUNTS	13.0	5.9	33.3		-	50.0		25.0	.0
EXPANSION OF CURRENT FUNCTIONS	8.7	5.9	16.7		-	.0		.0	10.0
LOAN PAYMENTS	4.3	.0	16.7		-	.0		.0	.0
ACCOUNT TRANSFERS	4.3	5.9	.0		-	.0		.0	10.0
POS VERIFICATION	.0	.0	.0		-	.0		.0	.0
LOWER VOLUMES OF CHECKS CASHED	.0	.0	.0		-	.0		.0	.0
BALANCE INQUIRY	.0	.0	.0		-	.0		.0	.0
OTHER	34.8	41.2	16.7		-	25.0		50.0	40.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 218A

PERCENTAGE OF COMPANIES EXPECTING TO INSTALL A SYSTEM WITHIN THE NEXT TWO YEARS

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	233	16	25	48	18	47	24	8	40	7
ATM/ATM TYPE MACHINES	43.3	75.0	52.0	39.6	22.2	48.9	33.3	25.0	40.0	57.1
EFT-POS DEVICES	16.7	12.5	12.0	18.8	22.2	21.3	-	12.5	20.0	28.6
TOTAL	107	11	14	18	8	24	8	2	18	4
ANTICIPATED SYSTEM										
ATM	79.4	100.0	78.6	77.8	50.0	83.3	87.5		66.7	100.0
CASH DISPENSER	31.8	54.5	28.6	27.8	12.5	29.2	25.0		38.9	-
EFT-POS SYSTEM LOCATED COMPLETELY IN CHECKOUT LANE	29.0	18.2	21.4	38.9	37.5	33.3	-		27.8	50.0
EFT-POS SYSTEM WITH PREAUTHORIZATION NOT IN CHECKOUT LANE	14.0	-	7.1	16.7	25.0	8.3	12.5		27.8	-
VOUCHER TYPE SYSTEM WITH NO CONNECTION TO THE PAYMENT MECHANISM	3.7	-	-	-	-	4.2	-		11.1	-
OTHER	2.8	-	7.1	-	-	4.2	-		5.6	-

TABLE 218B

PERCENTAGE OF COMPANIES EXPECTING TO INSTALL A SYSTEM WITHIN THE NEXT TWO YEARS

	ALL COMPANIES	RETAIL AFFIL. CHAIN	INDEPENDENT	1983 RETAIL SALES (IN MILLIONS OF DOLLARS) UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	233	74	159	72	51	50	28	14	18
ATM/ATM TYPE MACHINES	43.3	52.7	39.0	27.8	41.2	50.0	53.6	42.9	77.8
EFT-POS DEVICES	16.7	20.3	15.1	9.7	11.8	20.0	25.0	21.4	33.3
TOTAL	107	41	66	22	20	27	16	7	15
ANTICIPATED SYSTEM									
ATM	79.4	80.5	78.8	77.3	75.0	81.5	87.5	71.4	80.0
CASH DISPENSER	31.8	29.3	33.3	31.8	35.0	33.3	25.0	28.6	33.3
EFT-POS SYSTEM LOCATED COMPLETELY IN CHECKOUT LANE	29.0	26.8	30.3	27.3	30.0	25.9	31.3	42.9	26.7
EFT-POS SYSTEM WITH PREAUTHORIZATION NOT IN CHECKOUT LANE	14.0	7.3	18.2	9.1	15.0	18.5	18.8	-	13.3
VOUCHER TYPE SYSTEM WITH NO CONNECTION TO THE PAYMENT MECHANISM	3.7	7.3	1.5	-	-	-	6.3	14.3	13.3
OTHER	2.8	4.9	1.5	4.5	-	3.7	-	-	6.7

NOTE: DATA ONLY FOR COMPANIES NOT HAVING ATM OR EFT SYSTEMS
UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 219A

PERCENTAGE OF COMPANIES WHICH HAVE BEEN APPROACHED BY A BANK TO INSTALL

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NORTH EAST	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	237	17	26	50	17	47	25	7	41	7
ATM/ATM TYPE MACHINES	30.4	52.9	50.0	20.0	23.5	27.7	20.0	42.9	31.7	28.6
EFT-POS DEVICES	8.9	5.9	3.8	4.0	5.9	14.9	-	14.3	17.1	14.3

TABLE 219B

PERCENTAGE OF COMPANIES WHICH HAVE BEEN APPROACHED BY A BANK TO INSTALL

		RETAIL AFFIL.		1983 RETAIL SALES (IN MILLIONS OF DOLLARS)					
	ALL COMPANIES	CHAIN	INDEPENDENT	UNDER $10	$10-30	$31-100	$101-250	$251-500	$501+
TOTAL	237	74	163	77	49	51	29	14	17
ATM/ATM TYPE MACHINES	30.4	50.0	21.5	13.0	18.4	37.3	55.2	28.6	82.4
EFT-POS DEVICES	8.9	18.9	4.3	-	4.1	9.8	24.1	7.1	35.3

NOTE: DATA ONLY FOR COMPANIES NOT HAVING ATM OR EFT SYSTEMS
UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1984

TABLE 220

OPERATING RESULTS

(Current & Historical)

	1976	1977	1978	1979	1980	1981	1982	1983
Profit								
Gross Profit with Warehouse	22.2%	22.0%	22.6%	22.3%	22.4%	23.0%	23.4%	23.7%
Gross Profit without Warehouse	20.0	19.7	21.0	20.5	20.9	20.9	21.2	21.5
Store Door Margin	18.6	18.5	18.9	18.9	18.7	18.8	19.2	19.4
Net Profit (before taxes)	1.3	1.4	1.7	1.9	1.5	1.4	1.5	1.0
Expenses								
Store Labor	8.3	8.4	8.5	8.3	8.4	8.5	8.8	8.8
Fringe Benefits	1.5	1.7	2.0	1.8	1.9	2.0	2.1	2.2
Store Supply	0.9	0.9	0.9	0.9	1.0	0.9	0.9	0.9
Rent and Real Estate	1.3	1.3	1.3	1.2	1.3	1.3	1.4	1.4
Utilities	0.9	0.9	1.0	1.0	1.0	1.1	1.2	1.2

Source: Operations Review 1976-1983

TABLE 221

PERCENT OF DISPOSABLE INCOME SPENT ON FOOD

	All Food	Food at Home	Food Away from Home
1983	15.9%	11.4%	4.5%
1982	16.1	11.8	4.4
1981	16.7	12.3	4.5
1980	16.6	12.2	4.4
1979	16.5	12.4	4.1
1978	16.5	12.2	4.3
1977	16.7	12.5	4.1
1976	16.8	12.7	4.1

Source: U.S. Department of Agriculture
Economics, Statistics & Cooperatives Service

TABLE 223

CONSUMER PRICE INDEX*

Annual Average

	ALL ITEMS		FOOD AT HOME		FOOD AWAY FROM HOME	
	C.P.I.	Percent Change	C.P.I.	Percent Change	C.P.I.	Percent Change
1983	298.4	3.2	292.2	1.1	319.[illegible]	4.4
1982	289.1	6.1	279.2	3.4	306.5	5.3
1981	272.4	10.4	269.9	7.3	291.0	9.0
1980	246.8	13.5	251.5	8.0	267.0	9.9
1979	217.4	11.3	232.9	10.8	24[illegible].9	11.2
1978	195.4	7.7	210.2	10.5	218.4	9.0
1977	181.5	6.5	190.2	6.0	200.3	7.5
1976	170.5	5.8	179.5	2.1	186.4	7.0

* 1967 = 100

Source: Consumer Price Index
Detailed Report for December
U.S. Department of Labor
Bureau of Labor Statistics

TABLE 224

HISTORICAL DATA

Average Percent Change in Retail Sales	
1982 vs. 1983	7.6%
1981 vs. 1982	8.7
1980 vs. 1981	9.3
1979 vs. 1980	14.1
1978 vs. 1979	15.0
1977 vs. 1978	13.1
1976 vs. 1977	9.5
1975 vs. 1976	8.7

Average Percent Change in Retail Sales-Identical Stores	
1982 vs. 1983	6.1%
1981 vs. 1982	7.7
1980 vs. 1981	8.1
1979 vs. 1980	11.4
1978 vs. 1979	11.7
1977 vs. 1978	11.8
1976 vs. 1977	8.0
1975 vs. 1976	6.7

Average Weekly Store Sales	
1983	$153,600
1982	160,500
1981	159,000
1980	110,000
1979	110,000
1978	88,337
1977	75,000
1976	72,425

Average Weekly Sales Per Square Foot	
1983	$6.95
1982	7.90
1981	6.75
1980	6.94
1979	6.49
1978	6.17
1977	5.80
1976	5.50

Average Sales Per Transaction	
1983	$14.60
1982	14.33
1981	14.23
1980	12.10
1979	11.60
1978	10.28
1977	9.85
1976	9.39

Average Number of Items in a Supermarket	
1983	16,719
1982	13,067
1981	12,877
1980	14,145
1979	12,745
1978	11,767
1976	9,000
1974	9,000

Definitions

Chain	Retailers with eleven (11) or more supermarkets.
Delivery Cost	The total amount of delivery expense charged to the retail store operation, including salaries, fringe benefits including payroll taxes, equipment depreciation and rental, taxes and licenses, insurance, repairs, gas and oil, and operating supplies.
Fringe Benefits	The company's share of payroll taxes (including those payable under the Federal Insurance Contribution Act, state and federal unemployment compensation, Workers' Compensation), holiday and vacation pay, group insurance, pension, profit sharing, retirement, severance pay, and bonus unless it is a significant amount paid on a regular, recurring basis.
Identical Stores	Supermarkets in operation throughout the entire two-year period, 1980 and 1981.
Independent	Retailers with ten (10) or less supermarkets.
Scratch Rate	Percentage of items ordered from the distribution center but not shipped to the store.
Selling Area	Customer area of the store.
Shortage (Shrink)	Computered using the "retail method," it includes all inventory shortages, including disappearance, spoilage and damaged merchandise for which there is no supplier reimbursement. Shrink is reported at retail value as a percent of sales.
Store Door Margin	Gross profit after any wholesaler's fees minus warehouse, delivery, and headquarter's cost are deducted.
Store Labor Expense	The payment to all store personnel including the store manager, for straight and overtime wages and regular recurring bonus payments. Payments for sickness, absence, excused time off, training and commissions are included in this figure.
Store Rent and Real Estate	Rent paid for store building and parking lot, real estate taxes and insurance and amortization of lease-hold improvement.
Store Supplies	The expense incurred for checkout, wrapping and prepackaging supplies and maintenance supplies for cleaning, window washing, etc.
Store Supplies	A retail food store with annual sales of at least $2 million a year. Conventional Supermarkets (under 30,000 total sq. ft.) Super Stores (over 30,000 total sq. ft., expanded food and non-food selection). Combination Stores (over 30,000 total sq. ft. and at least 25% of area in General Merchandise). Limited Assortment Stores (carries less than 1000 items and offers few if any perishables with a "no frills" shopping environment). Warehouse Stores (uses utilitarian fixtures and emphasizes lowered prices at the expense of customer service).

Utilities Expense The cost for heating, light, water and power.

Warehouse Cost The total amount of warehouse expense charged to the retail store operation, including such items as salaries, fringe benefits, warehouse rental, equipment rental or depreciation, utility cost and supplies.

Wholesaler: A company which reported wholesale sales in 1981 to supermarkets, institutions and/or businesses other than those owned by the company and primarily engaged in selling a general line of food and related products to food stores.

A. Cooperative:
(Independent)—Retailers who are stockholder members of cooperative wholesale buying groups.

B. Voluntary:
(Independent)—Retailers who belong to voluntary merchandising groups sponsored by wholesalers and who operate under a common name.

C. Unaffiliated:
(Independent)—Retailers who are not affiliated with either wholesale, cooperative or voluntary merchandising groups sponsored by wholesalers.

Region The geographic area in which the company headquarters is located. Listed below are the states which fall into each region.

Northeast
Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

Middle Atlantic
New Jersey
New York
Pennsylvania

East North Central
Illinois
Indiana
Michigan
Ohio
Wisconsin

West North Central
Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

Southeast
Alabama
Delaware
District of Columbia
Florida
Georgia
Kentucky
Maryland
Mississippi
North Carolina
Puerto Rico
South Carolina
Tennessee
Virginia
West Virginia

West South Central
Arkansas
Louisiana
Oklahoma
Texas

Mountain
Arizona
Colorado
Idaho
Montana
Nevada
New Mexico
Utah
Wyoming

Pacific
Alaska
California
Hawaii
Oregon
Washington

Canada

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THE FMI DISTRIBUTION CENTER OPERATIONS QUESTIONNAIRE 1984

This questionnaire is part of FMI's annual industry study and is designed to provide descriptive and comparative information for this important segment of the food industry. Only with your participation and expertise can concise and representative data be developed. All information will be held in strictest confidence.

If you have any questions, please call the research department of FMI - (202)452-8444.

A. General Operations

1. Is your company primarily a: (Please circle one.)

retailer? 1
cooperative wholesaler? 2
voluntary wholesaler? 3
unaffiliated wholesaler? 4

2. What were your company sales in (if 1983 figures are not yet available, please give an estimate):

a. 1982? . . . . $ ____________ million
b. 1983? . . . . $ ____________ million

3. How many supermarkets does your operation serve/own (a supermarket is a retail food store with annual sales of at least two million dollars)?

a. own? . . . . ____________ supermarkets
b. serve as a wholesaler? . . . . ____________ supermarkets

4. What percentage of your total annual shipping volume in dollars is attributed to:

a. corporately owned stores? . . . . __ __ __.__ %
b. independent food stores? . . . . __ __ __.__ %
c. other food chains? . . . . __ __ __.__ %
d. convenience stores? . . . . __ __ __.__ %
e. restaurants? . . . . __ __ __.__ %
f. hospitals? . . . . __ __ __.__ %
g. schools? . . . . __ __ __.__ %
h. other ______________________________ __ __ __.__ %
(please specify)
TOTAL 1 0 0 . 0 %

B. Fleet

5. Please complete the following chart to describe your company's fleet in 1983. If data are not available by category, please just complete the total column.

		Column A Owned by Your Company	Column B Leased Equipment	Column A&B TOTAL OPERATED BY YOUR COMPANY
a. Total Number of Trailers	Refrigerated			
b.	Dry			
c. Total Number of Tractors	3-Axle			
d.	2-Axle			
e. Total Number of Truck Fleet Miles in 1983				
f. Total Dollar Amount Spent for Fuel (including tax)		$	$	$
g. Total Gallons Purchased				
h. Average Fleet Miles Per Gallon		__ __ .__ mpg	__ __ .__ mpg	__ __ .__ mpg

6. How many drivers are normally employed by your company?

	Company	Hired Service
a. full-time	______________	______________
b. part-time	______________	______________

C. Dry Grocery Distribution Center/Section (excluding Cigarettes)

7. Please complete a separate line for each of your Dry Grocery distribution centers/sections:

Dry Grocery Distribution Center/ Section	Total Area in Sq. Ft.*	Type of Selection Method** (Circle)	Total No. of Employees in Distribution Center/ Section***	Average No. of Cases Shipped Per Typical Week	Average No. of Supermarkets Served Per Center	Average No. of Shifts Per Day	Average No. of Items Available	Average No. of Inventory Turns	Current Scratch Rate ****	Average No. of Inbound Truck Loads Per Week
#01		A B C							__.__ %	
#02		A B C							__.__ %	
#03		A B C							__.__ %	
#04		A B C							__.__ %	
#05		A B C							__.__ %	
#06		A B C							__.__ %	

Footnotes

*Total areas includes everything under roof such as receiving, storage and offices which are involved with Dry Grocery Distribution Center. Exclude manufacturing and parking.

**Select one primary method per center. A, manual selection; B, select to conveyor, or C, automated selection.

***Please include all full-time Dry Grocery center employees, supervisors, loaders, maintenance, cleaners, clerical, etc., who work in in each section. This includes direct and indirect labor.

****Scratch rate is the percentage of items ordered but not shipped to the store.

D. Refrigerated Distribution Center/Section (excluding Frozen Food)

8. Please complete a separate line for each of your distribution centers/sections:

Refrigerated Distribution Center/ Section	Commodity	Total Area in Sq. Ft.*	Type of Selection Method** (Circle)	Total No. of Employees in Distribution Center/ Section***	Average No. of Cases Shipped Per Typical Week	Average No. of Supermarkets Served Per Center	Average No. of Shifts Per Day	Average No. of Items Available	Average No. of Inventory Turns	Current Scratch Rate ****	Average No. of Inbound Truck Loads Per Week
#01			A B C							__.__ %	
#02			A B C							__.__ %	
#03			A B C							__.__ %	

Footnotes

*Total area includes everything under roof such as receiving, storage and offices which are involved with Refrigerated Distribution Center. Exclude manufacturing and packing.

**Select one primary method per center. A, manual selection; B, select to conveyor, or C, automated selection.

***Please include all full-time and part-time Refrigerated Distribution Center employees, supervisors, loaders, maintenance, cleaners, clerical, etc., who work in the Refrigerated distribution center/section. If personnel works in more than one section, please estimate the employees by fraction of time spent in each section. This includes direct and indirect labor.

****Scratch rate is the percentage of items ordered but not shipped to the store.

Average No. of Inbound Rail Cars Per Week	Average No. of Outbound Vehicle Loads Per Week	Average No.of Cases Stored and Replenished Per Direct Labor Hour*****	Average No.of Cases Selected Per Direct Labor Hour *****	Average No. of Cases Shipped Per Direct Labor Hour *****	Average No. of Cases Shipped Per Total Labor Hour ***	Average No. of Orders Processed Per Week	Average No. of Cases Received Per Direct Labor Hour *****	Average No. of Days Center Operates Per Week	Unionized Employees (Circle)
									Yes No
									Yes No
									Yes No
									Yes No
									Yes No
									Yes No

*****Only include direct labor hours used to perform that specific task. Direct labor is labor used to physically move merchandise through warehouse.

Average No. of Inbound Rail Cars Per Week	Average No. of Outbound Vehicle Loads Per Week	Average No. of Cases Stored and Replenished Per Direct Labor Hour *****	Average No. of Cases Selected Per Direct Labor Hour *****	Average No. of Cases Shipped Per Direct Labor Hour *****	Average No. of Cases Shipped Per Total Labor Hour ***	Average No. of Orders Processed Per Week	Average No. of Cases Received Per Direct Labor Hour *****	Average No. of Days Center Operates Per Week	Unionized Employees (Circle)
									Yes No
									Yes No
									Yes No

*****Only include direct labor hours used to perform that specific task. Direct labor is labor used to physically move merchandise through warehouse.

E. Traffic and Transportation

9. What percentage of inbound truck loads is delivered by:
(Please estimate if exact figures are unknown.)

a. suppliers' private carrier . . . . __ __ __.__ %
b. common carrier (suppliers' and yours) . . . . __ __ __.__ %
c. contract carrier (suppliers' and yours) . . . . __ __ __.__ %
d. independent trucker (suppliers' and yours) . . . . . __ __ __.__ %
e. company trucks/backhaul . . . . __ __ __.__ %
TOTAL 1 0 0 . 0 %

10. What is the average number of miles per round trip per truck (include retail delivery and backhaul)? . . . . ____________ miles

11. What is the average/longest distance between your distribution center and the stores you serve by region?

	Average	Longest
a. Northeast	________ miles	________ miles
b. Middle Atlantic	________ miles	________ miles
c. East North Central	________ miles	________ miles
d. West North Central	________ miles	________ miles
e. Southeast	________ miles	________ miles
f. West South Central	________ miles	________ miles
g. Mountain	________ miles	________ miles
h. Pacific	________ miles	________ miles
i. Canada	________ miles	________ miles

F. Wholesale Operations

If you are a wholesaler, please answer number 12.

12. Does your company provide any of the following services to your retailers (Please circle yes or no):

	Yes	No		Yes	No
a. advertising program.	1	2	k. equipment procurement.	1	2
b. educational/training program	1	2	l. gross margin report by item.	1	2
c. retail accounting service.	1	2	m. handle private label	1	2
d. member payroll	1	2	n. handle generic label	1	2
e. individual retail pricing program.	1	2	o. discount programs.	1	2
f. real estate & store engineering.	1	2	p. space allocation	1	2
g. interior decor & design service.	1	2	q. scanning support	1	2
h. product movement data.	1	2	r. DSD system	1	2
i. equipment and fixture financing.	1	2	s. other ________________ . . (please specify)	1	2
j. lease financing.	1	2			

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THE FMI RETAIL OPERATIONS QUESTIONNAIRE 1984

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in the supermarket retail operations. We encourage your participation so that the results may be as representative as possible. All data will be held in strictest confidence. Please answer as many questions as possible. You need not complete the entire questionnaire. If you have any questions, please call the Research Department of FMI - (202)452-8444.

A. General Operations

1. How many supermarkets does your company operate (a supermarket is a retail food store with annual sales of at least two million dollars)? . . . . ________ supermarkets

2. What were your retail supermarket sales in (if 1983 figures are not yet available, please give an estimate):

a. 1982 . . . . $ ________ million
b. 1983 . . . . $ ________ million

3. What were your sales for "identical stores" (those supermarkets which you had in operation throughout the entire two-year period, 1982 and 1983) for:

a. 1982 . . . . $ ________ million
b. 1983 . . . . $ ________ million

4. What percent of your operation is supplied by the following:

a. own warehouse . . . . __ __ __.__ %
b. voluntary wholesaler . . . . __ __ __.__ %
c. cooperative-wholesaler . . . . __ __ __.__ %
d. unaffiliated wholesaler . . . . __ __ __.__ %
e. direct vendor deliveries . . . . __ __ __.__ %
TOTAL 1 0 0 . 0 %

5. What percentage of your total supermarket sales in 1983 is accounted for by: a. General Merchandise . . .__ __.__ %

b. HaBA . . .__ __.__ %

c. Tobacco . . .__ __.__ %

6. Please provide total company data for the following items:

a. What were your average weekly sales per supermarket in 1983? . . . . $ __,__ __ __,__ __ __

b. What were your average weekly sales per checkout in 1983? . . . . $ __ __,__ __ __

c. What was the average sale per customer transaction for your supermarkets in 1983? . . . . $ __ __.__ __

d. What were your sales per labor hour for store employees in 1983? . . . . $ __ __ __.__ __

e. What were your average weekly sales per square foot of selling areas in 1983 (divide average weekly sales for all your supermarkets in operation the entire year by the number of square feet of selling area - customer area - in those stores)? . . . . $ __ __.__ __

Please provide total company data for the following items: (Continued from previous page.)

f. What is the total size, in square feet, of your typical store? . . . . __ __ __,__ __ __ (square feet)

g. What is the average retail price per item for all items sold in your supermarket during December, 1983? . . . . $ __.__ __

h. On average, how many different items does your typical supermarket carry (count each brand, size, flavor, variety, type of meat cut, etc., as a separate item)? . . . . __ __,__ __ __ number of items

7. Please complete the following chart for each type of store you operate. If you do not operate a particular store type, enter NA.

	Conventional Supermarkets (30,000 and under total sq. ft.)	Super Stores (over 30,000 total sq. ft., expanded food and non-food selection)	Combination Stores (over 30,000 total sq.ft., and at least 25% of area in General Merchandise)	Warehouse Stores (uses utilitarian fixtures and emphasizes lowered prices at the expense of customer service)
Number of Each Type of Store				
Average Weekly Sales per Store	$__ __ __,__ __ __	$__ __ __,__ __ __	$__ __ __,__ __ __	$__ __ __,__ __ __
Average Weekly Sales per Checkout	$__ __,__ __ __	$__ __,__ __ __	$__ __,__ __ __	$__ __,__ __ __
Average Sales per Customer Transaction	$ __ __.__ __	$ __ __.__ __	$ __ __.__ __	$ __ __.__ __
Sales per Labor Hour	$__ __ __.__ __	$__ __ __.__ __	$__ __ __.__ __	$__ __ __.__ __
Average Weekly Sales per Sq. Ft. of Selling Area	$__ __.__ __	$__ __.__ __	$__ __.__ __	$__ __.__ __
Average Total Size in Sq. Ft.	__ __ __,__ __ __	__ __ __,__ __ __	__ __ __,__ __ __	__ __ __,__ __ __
Average Retail Price per Item	$ __.__ __	$ __.__ __	$ __.__ __	$ __.__ __
Average Number of Items Carried	__ __,__ __ __	__ __,__ __ __	__ __,__ __ __	__ __,__ __ __

8. Does your company operate any food stores which do not fit the 4 categories listed in question 7? (Please Circle.) . . . Yes No If yes, please name and describe:

A. ____________ name of type __ __ __,__ __ __ sq.ft. __ __,__ __ __ number of items ____________ other descriptive features

B. ____________ name of type __ __ __,__ __ __ sq. ft. __ __,__ __ __ number of items ____________ other descriptive features

C. ____________ name of type __ __ __,__ __ __ sq. ft. __ __,__ __ __ number of items ____________ other descriptive features

B. Merchandising

9. In how many supermarkets are you currently using the following promotional techniques:

a. trading stamps? . . . . ____________ supermarkets
b. games? . . . . ____________ supermarkets
c. continuity programs? . . . . ____________ supermarkets
d. in-store coupons? . . . . ____________ supermarkets

10. What percentage of your total sales was spent on advertising by the company? . . . . __.__ %

11. What percentage of your advertising budget was spent on:

a. newspaper? . . . . __ __ __.__ %
b. radio? . . . . __ __ __.__ %
c. television? . . . . __ __ __.__ %
d. mailer/flyer? . . . . __ __ __.__ %
e. in-store coupons? . . . . __ __ __.__ %
f. billboards? . . . . __ __ __.__ %
g. other? . . . . __ __ __.__ %
TOTAL 1 0 0 . 0 %

12. How many of your supermarkets are presently accepting credit cards:

a. for grocery items? . . . . ____________ supermarkets
b. for pharmaceutical items and/or
non-foods? . . . . ____________ supermarkets

C. Scanning

Please check here if you do not have any scanners /_/ and skip to question 18.

	Yes	No
13. By the end of 1983, will your company be 100% scanning? (Please circle).	1	1

14. In how many stores are you now scanning? . . . . ____________ supermarkets

15. In how many stores are you scanning random weight items? . . . . ____________ supermarkets

16. In which of the following ways are you currently using your scanning POS data (Please circle yes or no):

	Yes	No		Yes	No
a. checker performance	1	2	g. meat department analysis	1	2
b. coupon accounting	1	2	h. produce department analysis.	1	2
c. specials	1	2	i. new product evaluation	1	2
d. work scheduling	1	2	j. price elasticity	1	2
e. shrink analysis	1	2	k. reordering	1	2
f. shelf allocation	1	2	l. other, please specify ________________ ________________________________	1	2

	Yes	No
17. Do you have someone specifically responsible for the analysis of scanning data?	1	1

18. In how many supermarkets are you currently operating a:

a. deli offering carry-out items? . . ________ supermarkets
b. restaurant? . . . . ________ supermarkets
c. lunch counter/snack bar? . . . . . ________ supermarkets
d. floral/plant shop? . . . . ________ supermarkets

e. beer? . . . . ________ supermarkets
f. liquor? . . . . ________ supermarkets
g. wine? . . . . ________ supermarkets
h. catering? . . . . ________ supermarkets

i. service meat? . . . . ________ supermarkets
j. fresh seafood? . . . . ________ supermarkets
k. pharmacy? . . . . ________ supermarkets
l. scratch and/or bake-off bakery? ________ supermarkets

m. reading center? . . . . ________ supermarkets
n. cosmetic center? . . . . ________ supermarkets
o. photographic service center? . ________ supermarkets
p. courtesy booth? . . . . ________ supermarkets

D. Bulk Foods

19. In 1983, in how many supermarkets did you sell bulk food items? . . . . ____________ supermarkets
(Please exclude the produce department).

If you did not carry bulk food items, please check here /_/ and skip to the bottom of the page.

20. For those stores which handle bulk how many bulk items are typically carried? . . . . . . __,__ __ __ per supermarket

21. Please circle whether or not you carried any of the following products in bulk:

	Yes	No
Grains	1	2
Nuts/Seeds	1	2
Powdered Items	1	2
Confectionary Items	1	2
Pasta	1	2
Syrups/Sauces	1	2
Dried Fruit	1	2
Trail Mix-Type Products	1	2
Coffees	1	2
Teas	1	2
Cookies	1	2
Herbs and Spices	1	2
Peanut Butter, Preserves, Honey	1	2
Bakery Products	1	2
Other, please specify	1	2

____

FMI USE ONLY

	Yes	No
O _____	1	2
P _____	1	2
Q _____	1	2
R _____	1	2
S _____	1	2
T _____	1	2
U _____	1	2
V _____	1	2
W _____	1	2
X _____	1	2
Y _____	1	2
Z Other	1	2

0883A

PRODUCE DEPARTMENT OPERATIONS
1984

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in the supermarket produce department. We encourage your participation so that the results may be as representative as possible. All data will be held in strictest confidence.

If you have any questions, please call the Research Department of FMI - (202) 452-8444.

A. GENERAL OPERATIONS

1. What percentage of your total retail sales in 1983 was accounted for by the produce department? . . . . __ __.__%

2. How has this changed since 1982? (Please circle number and give percentage.) . . . . . .
Increased __ __.__% 1
Decreased __ __.__% 2
No change 3

3. Does the produce sales percentage include: (Please circle yes or no.)

	Yes	No		Yes	No
a. Chilled Juices	1	2	e. Salad Bar	1	2
b. Floral	1	2	f. Charcoal	1	2
c. Refrig. Salad Dressing .	1	2	g. Fresh Peanut Butter . .	1	2
d. Health/Snack Mixes . . .	1	2	h. Other, please specify ____________ .	1	2

4. Do you have a juice machine available for fresh orange juice? (Please circle.) . . . . Yes No

5. What is the average percent of selling area-"customer area"-devoted to the produce department? . . . . __ __.__%

6. How has this changed since 1982? . . . . . .
Increased __ __.__% 1
Decreased __ __.__% 2
No change 3

7. In your produce department, what is the average number of employees per store, including the department manager? (Please use full-time equivalents for part-time people.). . . . . __ __ __ number of employees

8. What were your sales per labor-hour for produce department employees, including the department manager, in 1983? . . . . $ __ __ __.__ __ sales per labor hour

9. On average, how many different fresh produce items does your produce department carry?

in the summer? . . . . __ __ __ items
in the winter? . . . . __ __ __ items

10. What percentage of your produce display is: bulk? . . . . _ _ _._ %
pre-pack? . . . . _ _ _._ %
100.0 %

11. What percentage of your produce items are weighed/priced: at the front end . . . . _ _ _._ %
in the produce department . . . . _ _ _._ %
100.0 %

	Yes	No
12. Are you using item price look-up at the front end? (Please circle.)	1	2

	Yes	No	Don't Have Scanners
13. Are you scanning pre-pack produce at the checkout? (Please circle.)	1	2	3

14. Do you provide any of the following items in your produce department?

	Yes	No
Produce nutritional information	1	2
Recipes for produce	1	2
Information on handling and storage	1	2
Eating Characteristics and Hints.	1	2

B. FORMAL PRODUCE IDENTIFICATION TRAINING PROGRAMS

15. Do you have a formal produce identification training program for:

	Yes	No
your cashiers	1	2
your produce employees	1	2

If you do not have any formal produce identification programs, please skip to question 19.

	Yes	No
16. Do you have identification accuracy standards/measurements for checkers?	1	2

17. Do you train only new hires or do you periodically re-train or test other employees? Please circle.

	Train New Hires		Re-Train Current Employees	
	Yes	No	Yes	No
Cashiers	1	2	1	2
Produce clerks	1	2	1	2

18. Who is responsible for this training? . . . .

	for Cashiers		for Produce Employees	
	Yes	No	Yes	No
Front-End Manager	1	2	1	2
Store Manager	1	2	1	2
Produce Manager	1	2	1	2
Produce Supervisor	1	2	1	2
Training Staff	1	2	1	2
Other, please specify	1	2	1	2
	______________		______________	

C. SALAD BARS

19. In 1983, in how many supermarkets did you provide a salad bar? . . . . __________supermarket

If you did not have any salad bars, please check here /__/ and skip to the bottom of the page.

20. What percent of your produce department sales was accounted for by the salad bar? . . . . __ __.__ %
per typical supermarket

21. On average, how many items does your salad bar carry:

a. Lettuce-type items . . . . __ __ __ items
b. Vegetable items . . . . __ __ __ items
c. Fruit items . . . . __ __ __ items
d. Cold Cuts . . . . __ __ __ items
e. Salad Dressings . . . . __ __ __ items
f. Other, please specify ________________________________ __ __ __ items

TOTAL ITEMS . . . . __ __ __ items

	Yes	No
22. Do you have a place inside the supermarket for the customers to eat the salad?	1	2

23. How many store employees have responsibility for the salad bar? (Please circle one and complete.)

a. One designated full-time 1
b. Several full-time produce employees. . 2 . . Specify number __ __
c. One part-time employee 3
d. Other, please explain. . . . . 4 . . Specify number __ __
____

0939A

MEDICAL BENEFITS COSTS
1984

This questionnaire is part of FMI's annual industry study and is designed to provide descriptive and comparative information for this important area of the food industry. Only with your participation and expertise can concise and representative data be developed. All information will be held in strictest confidence.

If you have any questions, please call the research department of FMI -- (202)452-8444.

Please answer as many questions as you can. You need not complete every question.

1. Have you initiated any of the following programs for your employees? (Please circle either Yes or No.)

	YES	NO
a. High Blood Pressure Control	1	2
b. Alcohol and Chemical Abuse Control . . .	1	2
c. Smoking Cessation	1	2
d. Nutrition and Weight Control	1	2
e. Mental Health Counseling	1	2
f. Stress Reduction Program	1	2
g. Health and Fitness Program	1	2

2. Do you provide any of the following services for your employees?

	Yes	No
a. First Aid Station	1	2
b. Sick Room	1	2
c. Nurse	1	2
d. First Aid Specialist	1	2
e. Health Newsletters, Brochures	1	2

3. In your medical health plan, do you provide any of the following?

	Yes	No
a. Cafeteria Benefits Plan	1	2
b. Reimbursement Account	1	2
c. Stop-Loss Provision	1	2

4. Do you encourage your employees to use any of the following?

	Yes	No
a. Ambulatory Surgery	1	2
b. Home Health Care	1	2
c. Home Professional Nursing	1	2
d. HMO's (Health Maintenance)	1	2

	Yes	No
5. Have you increased: a. individual deductions within the past year?	1	2
b. family deductions within the past year?	1	2
6. Do you require all employees to pay deductibles?	1	2

	Yes	No
7. Do you educate your employees to: ask specific questions before surgical procedures?.	1	2
ask for written estimate beforehand?	1	2

Second Opinion

		Yes	No
8. Do you require a second opinion:	for all procedures?	1	2
	for specific procedures?	1	2
9. Do you ask voluntarily for your employees to obtain a second opinion:	for all procedures?	1	2
	for specific procedures?	1	2

If yes, who pays for the voluntary second opinion? Please circle.

Company . . .	Yes	No	Employee . . .	Yes	No	Other . . .	Yes	No
	1	2		1	2		1	2

Medical Costs

10. What are the total costs for your medical benefits program as a percent of: . . . . total payroll __ __.__ __ %

total benefits __ __.__ __ %

total annual sales __ __.__ __ %

11. Medical Benefits for Store-Level Personnel are what percent of total store-level employees: . . . . total benefits package __ __.__ __ %

total wages and salary __ __.__ __ %

12. How have your company's medical benefits costs changed in the last two years? . . . Increased __ __.__ __ % 1

Decreased __ __.__ __ % 2

Remained the Same 3

13. If your medical costs have increased, have you reviewed or incorporated any alternatives to lower the costs? . . Yes No

a. If you have considered or incorporated alternatives, please explain. ____

____

b. If yes, can a member of the FMI staff contact you to discuss your medical benefits program?. . . Yes No
He/She will not see your answers to this questionnaire.

AUTOMATED TELLER MACHINES
AND
ELECTRONIC FUNDS TRANSFER

PART I

This questionnaire is part of an annual FMI industry study. It is designed to explore the use of Automated Teller Machines and Electronic Funds Transfer devices (EFT-POS) in supermarkets and to provide retailers with an insight into this new and expanding area. Please answer as many questions as you can. You need not answer all questions. All data will be held in strictest confidence. If you have any questions, please call the Research Department of FMI - (202)452-8444.

For this questionnaire: **ATM is a machine whose primary functions are cash dispensing, balance inquiry, account transfer and deposit taking.**

EFT-POS device is any type of equipment that is directly involved in authorization or settlement of financial transactions. It usually does not dispense cash. It can be located anywhere in the supermarket.

1. Does your company operate any ATMs, similar machines or EFT-POS devices? . . . . Yes (GO TO Question 2)

. . . . No (GO TO Question 3)

2. Please list the number of supermarkets your company operates which have the following machines or terminals:

A. Automated Teller Machines or related-services terminals . ________supermarkets

B. EFT-POS Devices. . . . . ________supermarkets

TOTAL SUPERMARKETS . . . . ________supermarkets

Please follow the instructions on the two attached questionnaires.

If you have ATMs or other similar machines, please GO TO the yellow survey.

If you have an EFT-POS system, please GO TO the blue survey.

3. If your company has not installed any ATMs or EFT-POS devices:

A. Has your company been approached by a bank to install any system in your store? (Please circle.)

	YES	NO		YES	NO
ATM/ATM-type . .	1	2	EFT-POS devices . .	1	2

B. Do you expect your company to install any system in any of your stores within the next two years?

	YES	NO		YES	NO
ATM/ATM-type	1	2	EFT-POS devices . .	1	2

If yes, please describe the anticipated system by circling the appropriate numbers.

1 Cash Dispenser
2 ATM
3 Voucher-type system with no connection to the payment mechanism
4 EFT-POS system with preauthorization not in checkout lane
5 EFT-POS system located completely in checkout lane
6 Other, please describe ______________________________
____

Please answer if your have any ATM/CASH DISPENSER or

any other terminals that are capable of delivering similar banking service.

PART II

This questionnaire is part of an Electronic Funds Transfer survey. Please complete this part if you have any ATMs/Cash Dispensers or other machines capable or delivering similar banking services. Please answer as many questions as you are able. You need not complete every question. All data will be held in strictest confidence. If you have any questions, please call the Research Department of FMI - (202)452-8444.

1. How many of your machines are located:

a. Through the wall (the machine is accessed outside supermarket) . . . . ______________ machines
b. Outside the supermarket (stand alone, kiosk) . . . . ______________ machines
c. In front or in the vestibule (near entry, inside the supermarket) . . . . ______________ machines
d. Near checkouts . . . . ______________ machines
e. Other, please specify ______________________________ . . . . ______________ machines

TOTAL MACHINES ______________

2. Please circle how the system operates:
1 Customer Operated
2 Clerk Operated
3 Customer and Clerk Operated

3. On average, how many transactions do the machines average per week? . . . _,_ _ _ transactions/machine/week

4. What percentage of the transactions were:

a. Cash Dispensing/Withdrawals. . . . . _ _ _ %
b. Deposit Taking . . . . _ _ _ %
c. Balance Inquiry . . . . _ _ _ %
d. Account/Balance Transfer . . . . _ _ _ %
e. Other, please specify ______________________ . . . . _ _ _ %
1 0 0 %

5. What other services do you expect the system installed in your stores to perform in the next 5 years?

____

____

6. Who owns the terminals?. . . . .
a. Bank . . . . ______________ machines
b. Other Financial Institution. . . . . . . ______________ machines
c. Supermarket Company. . . . . ______________ machines
d. Third Party Service/Provider . . . . . . ______________ machines
e. Other, please specify ____________ ______________ machines

TOTAL MACHINES ______________

7. If the terminals are owned by someone other than the supermarket company, how is the supermarket company reimbursed, e.g. annually per square foot, per transaction, and by how much? Please circle and state amount.

Method of Compensation	Amount	Method of Compensation	Amount
1 Annual Fee	$ _ _,_ _ _	6 Monthly & Per Transaction	$ _ _ _._ _ $._ _
2 Monthly Fee	$ _._ _ _	7 Other ______________	$_,_ _ _
3 Flat Fee	$ _,_ _ _	8 Annual Per Square Foot	$ _ _ _._ _
4 Included in Other Bank Fees		9 Per Transaction	$ _._ _
5 No Charge			

8. Are your terminals part of a shared system or dedicated to one bank? Please give number of machines in each system.

a. ____________________number of ATMs in a shared system
b. ____________________number of ATMs with a dedicated system

9. In these supermarkets, what percentage of your customers have a card to access the machine? . . . . __ __.__ %

10. In these supermarkets, what percentage of your customers regularly use the machines? . . . . . . __ __.__ %

11. How has the installation of your system effected the volume of checks or cash at your checkout lanes? Circle one in each column.

1 Check Volume Increased	1 Cash Volume Increased
2 Check Volume Decreased	2 Cash Volume Decreased
3 Check Volume Remained the Same	3 Cash Volume Remained the Same

12. If the system is down, to whom do your customers complain? Please circle.

1 Supermarket Personnel
2 Bank, Financial Institute
3 Other, please specify ______________________________
4 Unknown

13. On a scale of 1 to 5, with 1 representing poor and 5 excellent, please rate the operation in your company:

	Poor 1	2	3	4	Excellent 5
a. Overall Performance	1	2	3	4	5
b. Customer Acceptance	1	2	3	4	5
c. Customer Usage	1	2	3	4	5
d. Customer Convenience.	1	2	3	4	5
e. Ease of Use	1	2	3	4	5
f. Hardware Reliability	1	2	3	4	5
g. Maintenance	1	2	3	4	5
h. Store Savings	1	2	3	4	5

READER'S COMMENT FORM

Report: The Food Marketing Industry Speaks 1984

YOUR COMMENTS COUNT . . .

FMI uses the comments it receives from readers like you to improve its research publications. Let us hear from you.

Page Number	**I had trouble with this section because it seemed unclear.**	**It would have been easier if the following information had been included**

Other Comments:

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YOUR COMMENTS PLEASE . . .

This manual is part of a library that serves as a reference source for members of the Food Marketing Institute. Your comments on the other side of this form will be carefully reviewed by the persons responsible for writing and publishing this material.

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